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# A Handbook for Building Re-use



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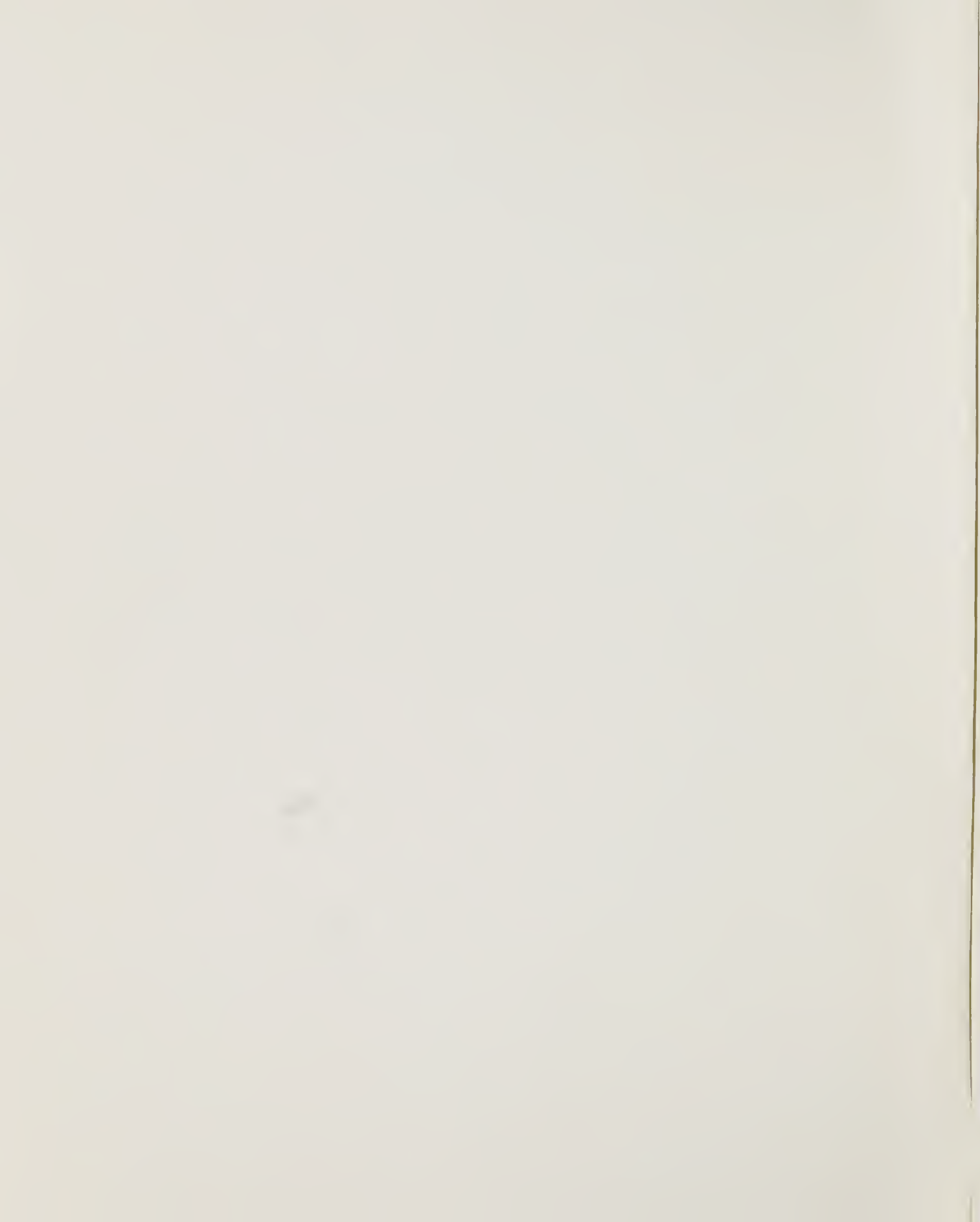
Lexington, Massachusetts  
The striking 1891 Hancock School was  
converted into eighteen residential  
apartments in 1978.

Dear Marion,  
So far the trip back  
home has been great.  
Much has changed  
but the town is still  
recognizable. You  
wouldn't believe our  
old Hancock School-  
it's been turned into  
apartments!  
See you soon,  
M.J.

POST CARD



METROPOLITAN AREA PLANNING COUNCIL



## Abstract

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As managers of public buildings, every municipal government in metropolitan Boston-- regardless of community size, population, location, or wealth-- must take steps to balance the natural but inevitable deterioration of their building stock with the community's constantly changing needs. Escalating costs of land, labor, and materials, coupled with energy shortages and a scarcity of investment capital, make reusing aging buildings a practical and attractive alternative to replacement through new construction.

This manual, geared to local government officials and community managers, encourages the adaptive re-use of buildings by outlining the typical steps in a re-use process. Through four case studies of actual local projects, the reader learns the advantages and disadvantages of building re-use and the management and decision-making processes necessary for a successful re-use program. Specific planning tools and resource directories are also included.

### On the cover:

The Hancock Elementary School, 1891, Lexington, MA., converted in 1978 to eighteen condominium residences. Developer for the project was Sidney-Noyes of Newton Highlands, MA. Black-and-white photograph reproduced with permission from the Lexington Historical Society.



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## About this Report

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A Handbook for Building Re-use was prepared by the staff of the Metropolitan Area Planning Council. The Metropolitan Area Planning Council is a regional planning council made up of chief-elected officials from 101 greater Boston cities and towns, 11 state agency representatives, and 21 gubernatorial appointees representing minority and consumer interests. MAPC works with communities on issues important to the greater Boston region. Housing, land use, transportation, economic development, water quality, energy, hazardous materials, air quality, and solid waste management are current target issues of MAPC involvement.

The preparation of this report was financially assisted by the cities and towns of the MAPC region and grants from the U.S. Department of Housing and Urban Development and the U.S. Environmental Protection Agency.

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# Acknowledgements

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This handbook is literally a documentation of work already accomplished in the Metropolitan Boston region. Much credit for the document then must go to the many local officials, private developers, architects, and local citizens who are setting the pace in the expanding field of adaptive re-use.

The preparation of the case studies was made easy by individuals eager and willing to share their experiences with others. I wish to express special thanks to: Marblehead Building Inspectors Herbert Haskell and Robert Sinclair, who provided everything I needed to write the Sewall School Case; Beverly Planning Director Frank Garretson, Assistant School Superintendent Armand Fortunato, and Board of Aldermen Chairperson Frances Alexander who recounted the Beverly Schools Case to me; Patrick Salony of the Gloucester Development Team and the Blackburn Tavern and Mr. Ike W. Colburn of Sea Rock Estate for the case on the Blackburn Tavern Building. I am also indebted to Mr. Richard T. Bennett, Scituate Town Administrator, who provided me with the documentation that enabled me to reconstruct the Scituate Building Management Case Study.

Without the extra help of several individuals the production of the handbook itself would not have been possible. Permission to reproduce the black and white photograph of the Hancock School for the cover was generously granted by the Lexington Historical Society, with the help of Mr. S. Lawrence Whipple, Archivist to the Society.

Special thanks for design and production go to: Laura B. Tarrish, designer of the cover and the interior format; Steve Brennan of the Printing Place, whose early advice helped to organize the production process, and Frank Clark of Stone Reprographics, whose expertise and personal attention made the cover technically possible.

Final thanks must go to John Connery, MAPC Director of Technical Assistance, for his constant encouragement and support, and to Camille Gilardi and Lois Baxter, whose lightning-fast typing repeatedly compensated for my snail-paced writing.

Kenneth Wong  
15 August 1979

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# Introduction

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As managers of public buildings, every municipal government in metropolitan Boston-- regardless of community size, population, location and wealth--must take steps to balance the natural but inevitable deterioration of its building stock with constantly changing local needs.

Historically, communities have neglected their aging structures, abandoning or demolishing them while constructing new buildings to meet new demands. Today, however, escalating costs of land, labor, and materials, coupled with energy shortages and a scarcity of investment capital, have forced cities and towns to reconsider this wasteful approach.

More and more communities are now renovating, preserving, and re-using their aging buildings instead of razing them. Local governments have made historic preservation and restoration, two activities traditionally considered only esoteric hobbies of the art crowd, an integral part of their planning toolbox.

The trend toward historic preservation has also spawned the "adaptive re-use" movement. Recycling, extended use, and adaptive re-use all refer to the extension of a building's lifespan by converting it to uses other than the original. Unlike rehabilitation--rebuilding structures for continued use of the same kind--re-use can address entirely new and different community needs. A school building no longer needed because of declining enrollments can be converted into an apartment building to help meet housing needs. An old shoe factory located in what is now a residential neighborhood can be converted into housing units. An old town hall in the downtown district can be reincarnated as a group of shops or as business offices.

Contracted by the Massachusetts Historical Commission, the Metropolitan Area Planning Council (MAPC) recently completed an extensive, region-wide survey of old public buildings not yet recorded in historic registers. This survey

identifies, in map form and in files, public buildings worth preserving in town and city centers, and provides profile information sheets, maps, and color slides of each. MAPC has published this manual as a companion document to the survey to encourage communities to implement adaptive re-use whenever practical. In addition, MAPC will provide member communities with direct technical assistance on re-use projects.

The MAPC began its Building Re-Use Project in September, 1978, partially funded by the Massachusetts Historical Commission. The purposes of the study were to:

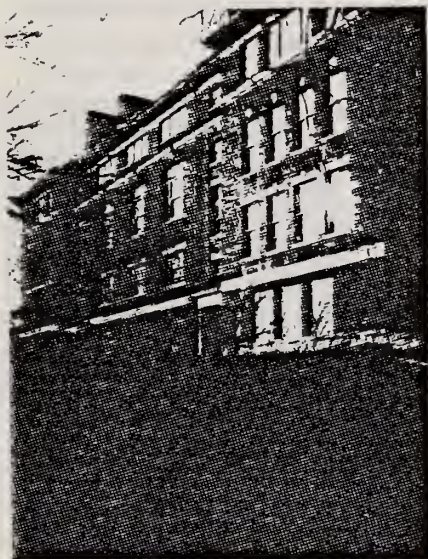
- ☐ Identify public management problems associated with building re-use and common to the cities and towns in the Metropolitan Boston area.
- ☐ Catalogue sources of funding available to communities interested in re-use.
- ☐ Channel re-use information from professionals to towns inexperienced but interested in re-use.
- ☐ Outline and present some management strategies and planning tools to local town governments concerned with the future of older public buildings.
- ☐ Produce a handbook on re-use for local governments within the MAPC region.

As a background to the study, MAPC conducted a survey of existing re-use literature. The Council found that while the literature offers considerable information on re-use in general, it does not provide tangible planning advice to local municipal governments. This handbook is designed to fill this information gap.

The second stage of the MAPC study was the inventory of completed and potential re-use

activity in the region. The primary purpose of the inventory was to establish a clear picture of the needs, problems, and challenges that face MAPC communities as they contemplate building re-use. Two conclusions emerged from the inventory. First, a tremendous wealth of information and expertise exists in isolated sections of the region, developed through local experiences. Second, the most successful re-use is that which is developed as part of a comprehensive plan that matches available resources with current and future needs. For instance, the survey found a number of vacant and underoccupied school buildings throughout the region. The planning process for the re-use of a school building should correlate the structure's assets (durability, size, location, etc.) with the community's needs. The re-use of a school to provide housing units, for example, can be a partial solution to a local housing problem.

The four case studies presented in this handbook were selected from the inventory. Although it is impossible to explore all the possibilities of re-use through a limited number of examples, the case studies allow careful examination of the processes and decisions a community can use in managing building re-use. The MAPC handbook is an anthology of stories and information provided by the region's own town officials, planners, building inspectors, architects, engineers, developers, and private individuals. The Council hopes this handbook will prove to be a useful planning tool for local governments.





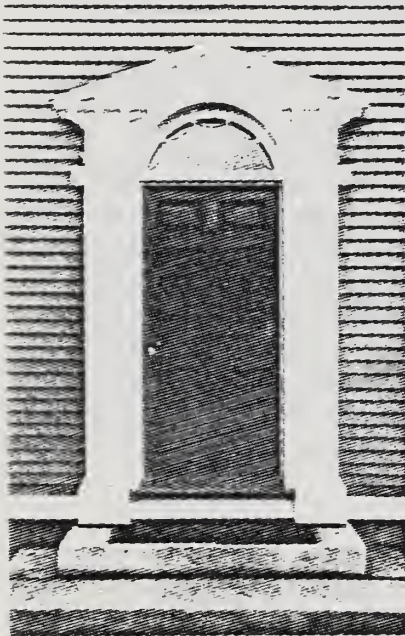
## Advantages & Drawbacks

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Finding it cheaper to reconstruct existing buildings than to build new ones from scratch, local governments have made historic preservation and adaptive re-use part of their everyday planning vocabulary. A look at the advantages and drawbacks to the re-use concept is a necessary first step in deciding if a re-use project is feasible for a particular building or community.

### ADVANTAGES OF ADAPTIVE RE-USE

#### Preserving Local History



The most obvious and commonly understood benefit of adaptive re-use is the preservation of local history. Buildings are evidence of the history of local development. Through their location in a community and their architectural style, buildings express the ideas and sentiments of previous eras. Adaptive re-use meets current community needs while preserving meaningful artifacts of local cultural heritage for future generations.

Older buildings often possess unique architectural value. The steadily increasing costs of natural wood and stone have necessitated their replacement with man-made substitutes and simulations. Many older buildings have natural materials in addition to unique architectural features not generally found in contemporary design or construction. A building need not be a historic monument to be of architectural value. Often well-maintained buildings which retain their old world quality after re-use will command higher rents than comparable new construction.

However, the benefits of adaptive re-use go beyond aesthetics. Adaptive re-use makes practical and economic sense too.

#### Savings In Time and Money

Adaptive re-use is cheaper than starting from scratch. If a building is retained and reused, the costs of demolition and site clearance are avoided. Also, re-use usually results in a net savings in site improvement costs since the sewage, water, and power infrastructures are already in place. Though these systems may require modern-

ization and/or expansion, these costs are likely to be much less than starting from scratch. Further savings are derived by sidestepping the excavation, landfilling, and grading that is required for new construction.

Adaptive re-use usually requires less time than new construction since demolition measures and most site improvements are avoided. And, because the bulk of adaptive re-use construction occurs inside the existing building shell, construction on a project can begin and continue throughout the calendar year.

#### Adaptive Re-use Stimulates Local Economic Development



Re-use can be a significant spur to economic and physical revitalization. Old buildings with successful secondlives symbolize a self-regenerating economic market, just as rundown and/or abandoned buildings can signify economic decline. Successful re-use of a building can stand as physical testimony to the vitality of a community.

Compared with new construction, adaptive re-use is labor intensive. In new construction, about 50 percent of the total project costs goes toward building materials; 50 percent toward labor. In adaptive re-use construction, an average of 75 percent of total project costs goes toward labor. The higher labor intensity offers the community two distinct advantages: 1) a high labor intensity means more jobs at a given project costs; and 2) the wages paid to employees re-enter and strengthen the local economy whereas wages paid for building materials are exported to economies in other areas.

#### Adaptive Re-use Conserves Energy and Resources

Adaptive re-use conserves energy and resources. Since adaptive re-use is labor intensive, fewer materials are required to produce a given amount of usable space. Studies have shown that adaptive re-use construction consumes less energy than new construction in producing the same amount of space.

Older buildings can also become extremely efficient facilities in terms of operating consumption. The



thicker walls and lower window area per square foot ratios characteristic of older construction can be used to produce building shells that perform quite efficiently.

### Adaptive Re-use as a Planning Tool

Adaptive re-use enables a community to manage its own growth with great specificity. With the right management and planning strategies existing buildings can aid local governments in their efforts to guide growth and development. Existing buildings can be used as tangible arguments in comparing and evaluating alternative proposals more easily than vacant parcels of land. Impacts are easier to forecast and easier to judge.

Also, local governments can insure that building development is consistent with local overall planning objectives. Rather than selling a buildings land unconditionally, communities can control the subsequent use of the property with great specificity. The case studies that follow illustrate how this can be done for the benefit of both community and developer.

### Support from the Federal and State Government

Adaptive re-use, historic preservation, and rehabilitation all share the common attitudes of resourcefulness and conservation. These activities are supported by a variety of federal and state programs which make adaptive re-use an even more attractive alternative to new construction. In some cases the availability of additional subsidiary funding makes the difference in deciding whether a project is feasible or not. For instance, special tax agreements, loans, subsidies, and grants are available for eligible projects and communities. These are discussed in more detail in Section X, Directory of Funding.



As with any concept, there are potential financial and social disadvantages to building re-use which must be identified.

## DRAWBACKS

Cost Estimation  
is Sometimes  
More Difficult

Cost estimation for each stage of the re-use project is more difficult than for new construction. In each phase-- design, demolition, modernization of services, structural reconstruction, etc., unanticipated conditions may emerge as the project unfolds. However, the community of expertise for re-use has grown considerable in recent years, and estimating project costs for adaptive re-use has becoming increasingly reliable.

Adaptive Re-use  
Requires a Higher Level  
of Professionalism

Adaptive re-use requires a higher level of professionalism than standardized new construction. Developers, architects, engineers, and construction professionals must be more resourceful and sophisticated in the blending of the new with the old. The selection of professionals and consultants may require a more careful and involved screening process.

Unguided Re-Use  
Can Lead to  
Displacement



Overzealous adaptive re-use can lead to the displacement of one population by another. Part of the interest in older buildings is that they can often be acquired at surprisingly low cost. Upgrading a building can cause rents and prices in an area to rise beyond the means of the original users or other residents in the neighborhood. Thus, unrestrained adaptive re-use can cause displacement of the elderly, low income, and small businesses. Local officials should make every effort to monitor and coordinate adaptive re-use to protect the greater community from such negative impacts.

## The Case Studies



How are these advantages and disadvantages balanced in a re-use process? What are the procedures a community can use to ensure that all considerations are taken into account in the course of such a process? What are the local government's choices when faced with a potential re-use project?

The following four sections of the handbook are designed to provide a road-map through some typical re-use processes and procedures. Using case studies from MAPC communities, the reader will see how the advantages and disadvantages of building re-use are considered in management and decision-making processes used by local governments.

The cases were selected to represent a variety of conditions and approaches to adaptive re-use. These are:

- ☐ Planning method and process-- the tools, procedures, and devices used by communities and the range of options and decisions that these represent.
- ☐ Use changes-- the new and old uses of the buildings in the case.
- ☐ Funding-- the sources, strategies, and procedures required by each.
- ☐ Community characteristics-- the population, size, location, income, etc. of the community in the case.

Each case study is presented in a standardized format. The presentation has been designed for easy reference and to clearly outline the information exemplified by each case. Each case history consists of the following major sections:

1. Basic Data: the facts of the case, the community and its characteristics, the use change, developer, architect, engineer, consultants, photograph, and vicinity map;
2. Flow chart of the reuse process; the



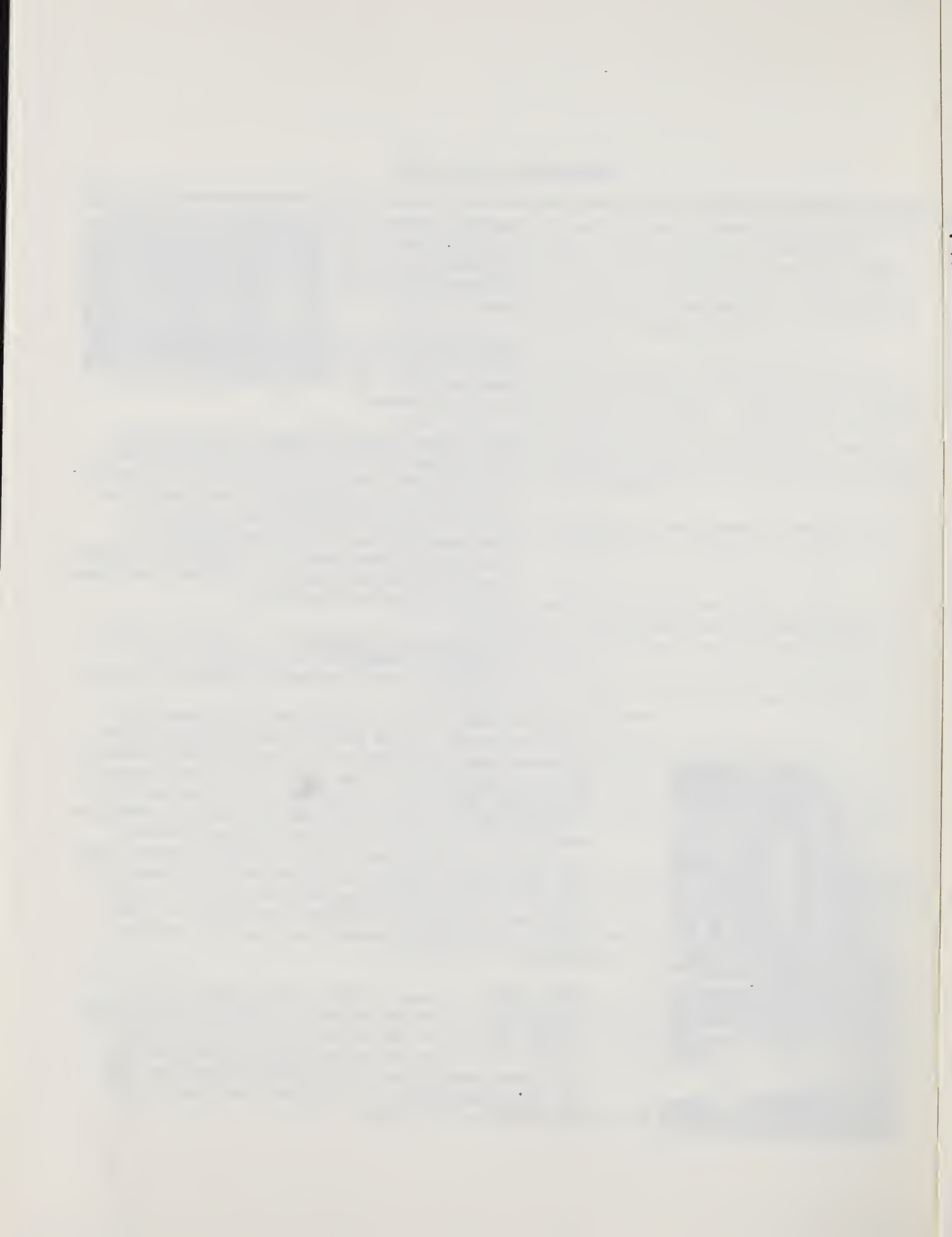
central focus of the case studies is the process used by the towns to plan and implement building re-use-- this flow chart will provide a synopsis of the process in graphic form.

3. Background narrative; this section provides a brief history of the building, the town, and the events that led to the re-use process.
4. The re-use process/account of the steps; each stage of the re-use process outlined in the flow chart is analyzed individually. Choices and considerations are identified and discussed, decisions are analyzed, and the advantages and disadvantages of the process are examined. Specific planning tools and techniques are described and their relative merits discussed.
5. The discussion/summary; a general conclusion and commentary on the case, its relevance, and its special characteristics.

The first case study, in Marblehead, demonstrates adaptive re-use in its most direct and least complicated form, executed at the local level without outside consultants, developers, or funding sources. The second case study, from Beverly, adds outside professionals, funding programs, government agencies, and specific planning tools to the basic re-use schema. The third case study, from Gloucester, adds the dimension of historic preservation to the discussion. And the final case study, from Scituate, outlines an overall management strategy for communities to use to prepare and plan for adaptive re-use.

MAPC hopes the case studies will assist local governments to better establish and manage building re-use procedures and policies. In designing a process to fit local needs, public officials may use these examples as a basis for discussion with the MAPC Department of Technical Assistance and Department of Housing.







## Case Study 1: Marblehead

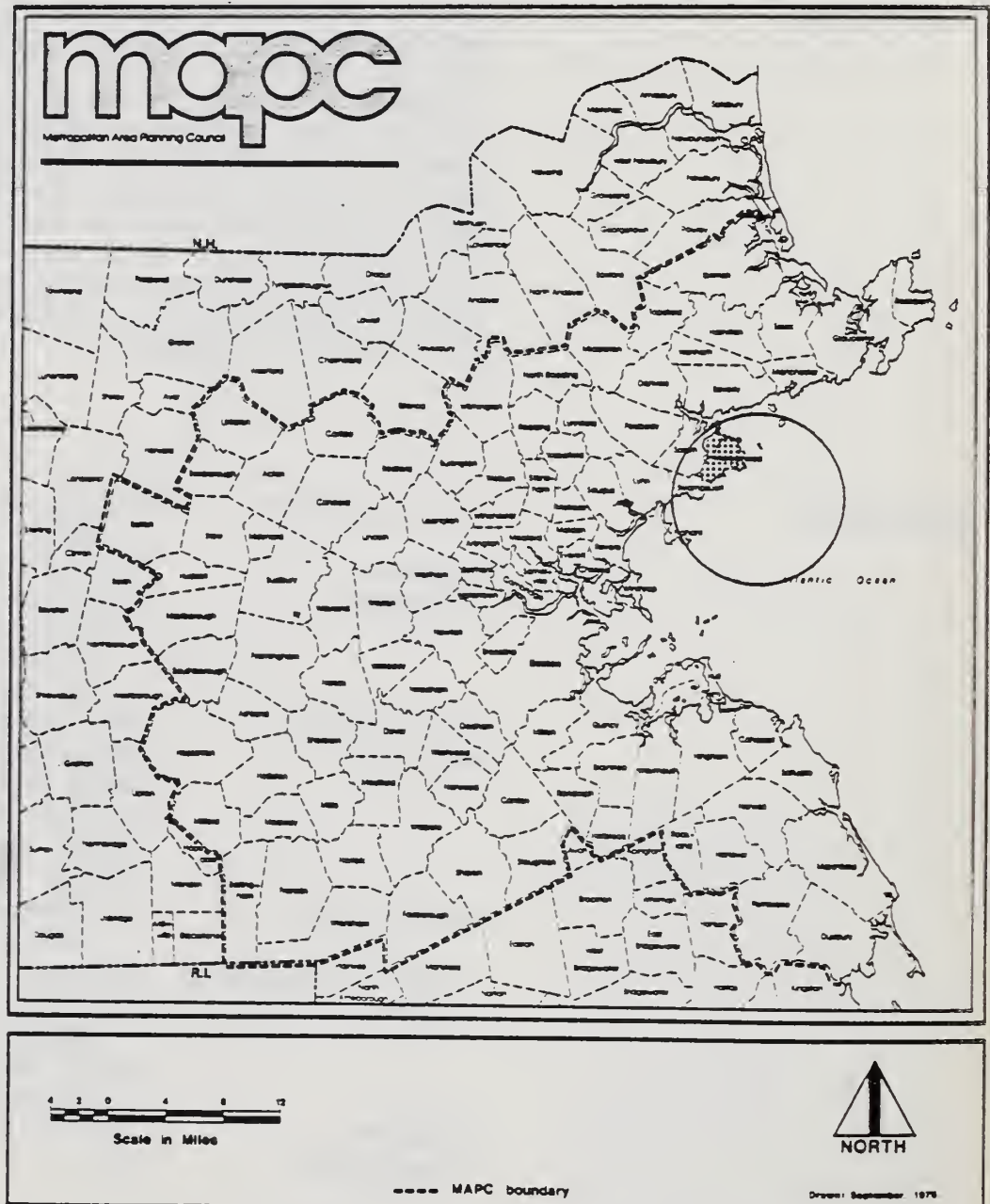
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### INTRODUCTION

The Marblehead case study is an example of building re-use in its most uncomplicated form--an "in-house" re-use. This occurs when a community re-uses an existing facility for its own needs, without outside funding, professionals, or consultants. This might be a community's first consideration for it is the simplest and least expensive way of adapting a building for continued use. It is most suitable for small- and medium sized-sized buildings, where the actual construction and modifications required are relatively minimal.

### BASIC DATA:

Building Name:	The Sewall Offices, formerly the Sewall School, circa 1840.
Address:	156 Elm Street
Community:	Marblehead, MA. settled 1629 population: 21,574 (1975 est.) per capita income: 3930 (1974)
Original Use:	Two-room schoolhouse
New Use:	Commissary (circa 1929) Youth enrichment services (1930's) Offices (beginning 1942) School (temporarily in late 1940's) Offices (1950's to present)
Construction:	Horizontal Clapboard and paint over wood-frame on stone foundation
Original Architect:	Unknown
Re-use architect:	Peare and Quiner, Boston (for modifications 1914) later adaptations by local engineering department and building dept.
Engineer:	Town staff
Consultants:	none

Regional  
Map

FLOW CHART OF  
THE RE-USE PROCESS

LEGEND OF SYMBOLS:

- local government
- municipal department
- local citizens
- ★ planning tools
- ☆ outside consultants

STEPS

ACTORS

- |                                      |  |
|--------------------------------------|--|
| 1 Designating a Building as Surplus  | <input type="checkbox"/> Custodial body (ie: school committee)<br>★ Space Needs Survey/Audit   |
| 2 Turnover to the Community          | ● Local government (ie: board of aldermen, selectmen)<br><input type="checkbox"/> Custodial Body (ie: school department)   |
| 3 Assessing the Building's Viability | ● Local government initiates<br><input type="checkbox"/> Municipal departments (ie: Town Engineer, Building Dept.)<br>☆ Outside consultants (ie: engineer, plumber, etc.)<br>★ Building Evaluation Forms |
| 4 Inventory of Community Space Needs | ● Local government or special committee<br><input type="checkbox"/> All municipal departments, committees, boards, etc.<br>★ Space Needs Survey  |
| 5 Preliminary Plan & Cost Estimate   | <input type="checkbox"/> Municipal departments (town/city engineer, architect)<br>☆ Outside consultants (assessors, estimators)  |
| 6 Approval of Plan                   | ● Local government (town meeting/public hearing)<br><input type="checkbox"/> All departments comment   |
| 7 Public Review                      | ● Local government (town meeting/public hearing)<br>○ Local citizens   |
| 8 Seeking Funds                      | ● Local government<br><input type="checkbox"/> Municipal departments (planning staff, community dev.)<br>☆ Outside consultants (HUD, OSP, DCA, MAPC, etc.)   |
| 9 Final Review/Approval              | ● Local government<br><input type="checkbox"/> Municipal departments<br>○ Local citizens   |
| 10 Implementation                    | <input type="checkbox"/> Municipal Department as Project Manager<br>☆ Outside consultants (contractors, sub-contractors, etc.)   |
| 11 Follow-up Management              | ● Local government transfers property<br><input type="checkbox"/> New Custodian designated (ie: municipal department)  |



BACKGROUND  
NARRATIVE



Located in downtown Marblehead, the circa 1840 Sewall School is a fine example of the two/three-story wood-framed school building that characterized this period in New England. The Sewall School, a modest building in the practical New England idiom, is a simple wood-framed rectangular box on a stone foundation with a hip-style roof. It sits at the intersections of Elm, Sewall, and Spring Streets, on a parcel of roughly one-tenth of an acre. The two floors, 30' X 40' each, provide about 2,400 square feet of usable space to the town. The school has served the town with several uses in its 140 years.

Ironically, the birth-date of the school can only be determined from its near death date. In 1884, the Sewall School was almost demolished. The Board of Selectmen had voted two appropriations in that year to meet the town's rising need for school facilities. Assuming that normal deterioration was part of the reason that the building was considered for demolition in 1884, the Building Department estimated that the Sewall School was probably built some forty years earlier. However, the Selectmen's \$700 appropriation to tear down the building was unanimously rejected at Town Meeting (46-0). The Sewall School continued to serve, unaltered, until 1914.

In 1914, the town enlisted architects Peare and Quiner, of Boston, to update and modernize the Sewall School. The architects added bathroom facilities, additional storage facilities, a teacher's office, centralized heating and ventilation, and a second exit stairway on the back of the building to meet the new fire code requirements. The rooms created by these wood partitions are still in use today.

In 1929, school use was discontinued and the building was used as a commissary for supply and foodstuff storage by the federal government. Marblehead Building Inspector Herb Haskell believes that a vote by the School Committee was all that was required for this change. According to Haskell, "there was no need for a complicated process for this change

in use, although it may have had to go by a Town Meeting for approval. This was a time of great need— other schools had been built by this time and the town must have needed a commissary. The Sewall School was probably readily available, and in a good location."

During the 1930's the Sewall Building was used by the Works Project Administration (WPA) as a crafts workshop for the local youth. A woodworking and metalworking shop for boys was housed upstairs and a sewing facility for girls occupied the lower floor. As Robert Sinclair, Marblehead Building Inspector remembers, "It was a place to go and learn how to work with your hands."

In 1942, the Sewall School underwent yet another "adaptive re-use". This change initiated the gradual shift in use from school to town offices. In 1942, the Marblehead Engineering Department moved into the top floor, and the school remained below. The building remained substantially unchanged, except that the fresh air heating and ventilation system was removed. (At this time, 60 percent fresh air ventilation was required only of schools.) As the years passed, the use of the building shifted back and forth, keeping pace with the changing needs of the town. At one point after WWII, part of the building was again used as a school, and the ventilation system was even re-installed. By the 1950's, however, the Sewall School was entirely occupied by town-related uses and offices.

For some time now, the Sewall School has been known as the Sewall Offices, referring to the name listed on the official map of Marblehead. Today, this ex-school houses Marblehead's Engineering Department, Sewage Department, Veterans Service, Finance Committee, and Housing Authority. And although the re-use process has been very gradual and upcomplicated, it is one that exemplifies the informal process of common-sense re-use.





## THE RE-USE PROCESS: An Account of the Steps

The Marblehead Sewall School case, like many others, demonstrates a re-use process conducted over an extended period of time, where the change from one use to another is gradual and almost ad hoc. Depending on the size and complexity of the building and the extent of a community's re-use objectives, the number of steps and the time between them in the re-use process may vary. The following account, based on the Sewall School, includes the typical actions a community might take to conduct an "in-house" re-use.

### Designating a Building As Surplus

The first step in a re-use process, is to identify the building as a surplus facility. In the case of the Marblehead Sewall School, as in most communities the School Committee was the body responsible for this action. However, in the Marblehead case, the surplus status of the Sewall School was more a result of the forces of time than official decree.

Changes in the quality and quantity of need for school facilities have characterized the last half-century. The relevance of the Sewall School for the Marblehead community was slowly eroded by social and economic forces--by the growth and migration patterns of the Marblehead population and the construction of larger and newer schools that accompanied them. Thus, the small wood-framed school became obsolete as a building-type for schools. The interest shifted to larger schools serving "extended neighborhoods", emphasizing more and larger accommodations for teaching and recreational activities. The Sewall School and other one and two-room school-houses that populate the region are reminders of this shift in the notion and meaning of the school.

Yet, even if a small school is no longer best suited for classroom use, the School Committee need not declare it surplus--at least not before considering at least two other possibilities. (It is not known if the Marblehead School Committee acted in this step.)



- Can the extra space be used for any other activity or program as part of the same department or body of custodianship? For example, in the case of a school: Can the school department use the extra space for special education programs, for a pre-school, or for extra-curricular activities? The extra space offered by changing needs can be a good opportunity for a department to provide services it has not been able to perform in the past.
- Can the extra space be put to administrative or other use by the same department or body of custodianship? In the case of a school, the school committee might want to move its administrative offices into the extra space, or might consider using part of the space for department-related storage.

#### Space Needs Survey/Audit

Before a building is considered surplus and released for disposition by community officials custodial body should take the opportunity to audit their own facilities and operations and to consider alternate uses and arrangements within their own department that might prove more productive. This consideration offers the department the first-right-of-refusal for their facility. If, after such consideration, the custodial body decides that the facility is indeed no longer needed, it should receive a "surplus" designation. Sample Space Need Survey Forms are included in the Technical Appendix of this handbook and provide a starting point for this kind of audit.

#### Turnover to the Community

Customarily, the building designated as surplus will be turned over to the community to either the board of aldermen, board of selectmen, or the town administrator. The process of re-use is then underway. The local officials must begin to use its departments and resources to manage the re-use or disposition of the building.

## Assessment of Building Viability

As a preliminary step, the surplus building must be checked for future viability. Usually, the board of aldermen or selectmen will enlist the local engineering department, planning staff, building department, and/or a special committee to examine and assess the building. Perhaps the most important assessment to be made of the building is of its basic structural condition. As in the case of the Sewall School, many old structures carry a misleading exterior appearance. Although a building may need extensive cosmetic work on the interior or exterior, its outward dilapidation may belie a sound structure within. Of course, the opposite is also possible. This is why every effort should be made to involve local professional expertise in the assessment of the structure, either through municipal departments or through enlistment of local residents with relevant professional expertise.

Several other aspects of the building should be assessed, including: the type and condition of heating and ventilation system; the available space in square feet; reclaimable areas for re-use; site conditions, assets, and disadvantages. These aspects are described in more detail in the Sample Building Evaluation Form in the Technical Appendix of this Handbook.

## Inventory of Space Needs

The community must make an assessment of the projected space needs for its various departments and operations. In the Marblehead case, the trend toward conversion to offices was prompted by the expansion of the local engineering department as well as the changing needs for school facilities. In the case of this small scale, no sophisticated inventorying method is required; changes in use are simply made. In other cases, when the building is very large or complex, or when the change in use is one which demands substantial structural and/or architectural modifications, the community might need to employ a much more explicit and standardized accounting technique. This technique is described in the fourth case study from the town of Scituate, Massachusetts.



(See Case Study Four, p.63)

Preliminary Plan  
& Cost Estimate

The proposed use change should be worked out in terms of actual construction and/or adaptation required by the new occupancy. This preliminary plan should account only for the new user's needs, but more importantly, for any work required by codes that will govern the new use.

In the Sewall School case, the change in use from school to offices required the removal of the central ventilation system. When it was changed back to a school, even though only temporarily, the system had to be re-installed. Costs imposed by compliance with fire safety and building codes could be substantial, and great care should be taken to anticipate them fully. Compliance should be checked for zoning ordinances as well as building construction. The preliminary construction plans should then be used to arrive at a total cost estimate.

Approval  
of the Plan

The preliminary plan and cost estimate can be used as a basis for discussion and approval of the proposal required by local zoning bylaws. A change in use may require a zoning variance or a building code variance. The community will have to consider many factors in their decision to approve or disapprove a re-use proposal. These include:

- ☐ Suitability of Use: In any re-use case, the impact of the new proposal on the immediate neighborhood and the rest of the community must be assessed.

In the Sewall School case, even the impact of the small number of offices had to be considered. Downtown Marblehead, as Haskell describes it, "...is a fairly densely developed section of town that has a mixture of uses. By the time the Sewall School had outlived its value as a school location, the nature of the surrounding neighborhood had already changed. It was no longer strictly residential, so the moving of offices there didn't create any

any problems of intrusion."

Thus, the proposed new use should be compatible with the existing or anticipated character of the neighborhood. This does not mean that it must be exactly the same as its surrounding uses. It should contribute constructively to the viability of the neighborhood, whether it is residential, commercial, or open space. At the very least, it should minimize negative impact such as noise and traffic congestion.

- ☐ Viability of the Building: Proposed plans should account for any physical improvements and/or repairs that are necessary to operate the building in its new use. Buildings with major structural inadequacies should not be considered.

In the Sewall School case, the building itself has remained square and true throughout its first 140 years. Although the exterior siding and roofing have required periodic renewal, the basic structure of the building is sound, and the original foundation perfectly viable.

- ☐ Relative Cost: The proposed plan should be compared to other alternatives. What would be the cost of comparable new construction? What are the costs in terms of maintenance if the building is left unoccupied? How serious is the need to move to new quarters?

In the Sewall School case, the need for small office facilities was very strong justification for the re-use of the structure. It would have been difficult to justify the high costs of new construction for the myriad of small offices that were demanded, any of which could fluctuate in size and need from year to year. Also it was more economical to use the building than not to use it at all, since nearly no new construction was required for the new office use. Since the building was basically sound, the failure to re-use it could have resulted in costs to the town of Marblehead in the form of accelerated depreciation due to weathering and exposure to



the elements.

- ☐ Management: In evaluating a re-use proposal, communities must consider the management arrangement implicit in the plan. For example will the new occupancy require any special and/or new management by the city itself? Who will have responsibility for the facility? Will it be transferred to another committee or department presiding over that particular use?

In the Marblehead case, responsibility for the Sewall School passed from the school committee to the board of selectmen. When the school became a collection of city offices, it was governed by no single department. The building became part of the general physical plant managed by the building department. In all cases, it is important to identify which local department will receive custodianship over the building in its new use.

- ☐ Other Criteria: In addition to these generic criteria, the different bodies in the community should consider specific measures relevant to their respective jurisdictions. For example, the building department would be concerned with fire and safety code compliance, the zoning board with specific setbacks, rights-of-way, density, etc, and the planning board economic and social impacts, traffic effects, ect.

Although the evaluation process for the proposed re-use will be similar to that of new construction, the community might make a special effort to make sensitive interpretations of codes and regulations. In some cases, the adaptive re-use of properties and buildings will require variances and special exceptions to become feasible undertakings from a physical or financial point of view.

After approval by the board of selectmen and subsidiary bodies, the scheme can be further developed by the city architect, engineer, and/or outside professional as needed.



### Town Meetings

In some towns, appropriation for the next stage of design development for bidding may require prior approval by Town Meeting. The decision to begin a project represents the consensus to change the use of the building.

As Haskell explained about the Sewall School case: "Just moving offices into the building really doesn't require Town Meeting approval, at least once the building has already changed use. I'd imagine, however, that the original decision to move the first offices required full Town Meeting approval, as this was a major change in the basic purpose of the building."

### Design Development For Final Bidding

The next step in this re-use process is further clarification and specification of the proposed construction, including its time schedule and cost. From exact plans and specifications, the community can solicit bids from contractors for the actual work. The final plans and construction bids and time estimates can then be used for final approval. Depending on the magnitude of the re-use proposal, outside consultants (architects and engineers) may not be needed during this stage.

### Seeking Funds

In the Sewall School Case, for example, the minimal modifications required for the offices were developed by the local engineering department. And in some cases as in Marblehead, the construction work can actually be handled by local staff as well.

"In-house" re-use is usually of such a limited scale that local funds can cover project costs. However, if the re-use is more extensive and costly, the community may want to pursue other possible funding sources. Aside from local appropriations, there are several federal and state sources of funding for building re-use:

U.S. Development Administration (EDA)  
U.S. Department of Housing and Urban

#### Development (HUD)

HUD Section 502, HUD 701, HUD Section  
8, Section 202, CDBG Program  
National Trust for Historic Preservation  
Community Facilities Loans/U.S. Department  
of Agriculture  
Massachusetts Housing Finance Agency (MHFA)  
Historic Preservation Grants in Aid/  
Massachusetts Historic Commission (MHC)

The programs and organizations are fully described in the Directory of Organizations and Director of Funds in this handbook.

In the Marblehead case, a simple appropriation by the board of selectmen was enough to cover project costs. Savings were realized by using town staff and expertise for the various stages of design, engineering, planning, building permits and fees, and construction.

#### Public Review and Final Ratification

In many towns, board of selectmen appropriations must be ratified by the general electorate through an open public hearing on the project. Town Meeting approval is usually followed by a closed-end appeals period, during which any local resident and citizen of the municipality may file and appeal against the project. In the Marblehead case, the board of selectmen appropriation for the conversion of the Sewall School to various town offices was approved and uncontested.

#### Implementation

Depending on the extent of the re-use project, the community may need to appoint a project manager to supervise the construction and to follow-up on inspections. In some cases, the construction will require outside sub-contractors. Local building inspectors or city engineers might operate in the capacity of general contractor during the course of the project.

In the Sewall School case, as in many "in-house" cases, the adaptive re-use construction was so minimal that it was monitored by the town engineer.



## Follow-Up Management

In any case, it is critical to identify some individual, body, committee, or agent to act as the project manager for the adaptive re-use.

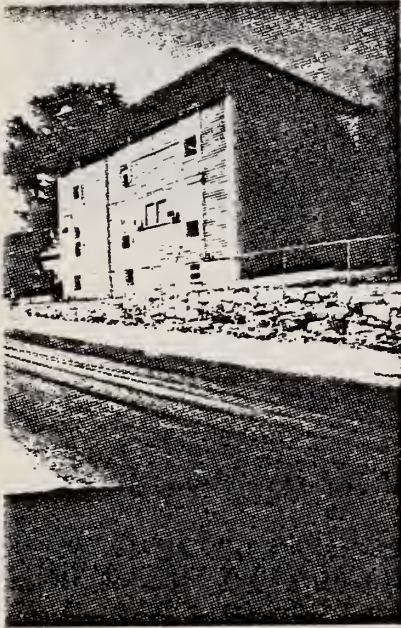
Once the re-use is complete, a custodian for the facility must be identified. Hopefully, this has been pre-arranged when approving the plan. (See page 19 for a discussion of that process. In the Sewall School case, the new occupants were a collection of city offices and public services. The building therefore fell under the general purview of the building department. In other cases, when the new use may be homogenously related to a single department or civic activity, the community may want to consider transferring custodianship.

## SUMMARY & COMMENTARY

The Marblehead Sewall Street is an excellent example of common-sense re-use on a local level--uncomplicated and direct. It is useful as a first case study because, in spite of its simple and obvious character, it clearly identifies the underlying issues in building re-use. The cases presented in the following sections of this handbook are considerably more complex. They involve many more formal techniques, interaction with state, regional and federal agencies, interactions with numerous private sector professionals, and design and construction on a much larger scale. However, the same essential techniques, procedures, and fundamental issues confront in a small-scale "in-house" re-use.

The Marblehead Sewall School case demonstrates that a community must have several capacities to be successful in adaptive re-use.

- ☐ A community must have some mechanism to audit its supply and demand for public buildings. It must be able to define and to designate surplus facilities and assess the basic viability of existing structures.



- ☐ A process for proposing and approving re-use activity must be established, standardized, and made as efficient as possible.
- ☐ The criteria for evaluating an adaptive re-use proposal must be carefully developed, continually updated, and effectively utilized in practice.
- ☐ A community must develop its own capacity to undertake adaptive re-use projects on scale that it can handle. And it must be able to sense when it is more advisable to enlist outside aid and expertise.

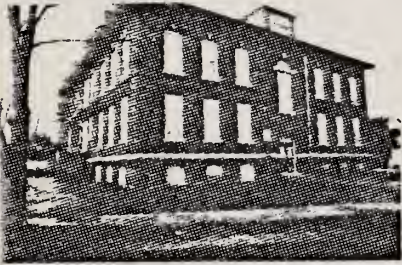
These four capacities are fundamental to adaptive re-use on a local level-- no matter how large or small the community or how simple or complex the project. These points represent at the very minimum, what a community needs to put adaptive re-use on any scale to its best advantage in local planning.





## Case Study 2: Beverly

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The Beverly case involves a different and more complex adaptive re-use planning process than the Sewall School example. It outlines a conversion process of adapting three separate buildings simultaneously within a compressed timeframe. In this case, local government takes an active leadership role, using its complete internal capacities, interacting with outside professionals and consultants, and considering external (federal and state) funding programs. This example uses specific tools which have become commonplace in the planning field. These tools, including the Request for Proposals and the Developer's Kit, will be described and explained in the following example.



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BASIC DATA:	Building Name:	C.S. Brown School, 1920 Farms School, 1903 Prospect School, 1895
	Address:	30 Conant Street (Brown) 66 Haskell Street (Farms) 12 Pickett Street (Prospect)
	Community:	City of Beverly established 1626 population: 37,382 (1975 est.) per capita income: 3392 (1974)
	Original Use:	Neighborhood schools (Brown, Farms) Downtown school (Prospect)
	New Uses:	Housing proposed for all three sites*
	Construction:	Masonry/brick (Brown) Masonry/brick (Farms) Stucco/wood frame (Prospect)
	Original Architect:	n.a.
	Re-use developer:	Leventhal-Conant Associates Waban, Mass.
	Re-use architect:	Drumme, Rosane, Anderson Newton, Mass.
	Engineer:	n.a.
	Consultants:	n.a.

\*Note:

The re-use construction has not yet begun. This case study focuses on the re-use planning process. All proposals for the re-use of the project, submitted on November 10, 1978, called for re-use of the three buildings as housing units.





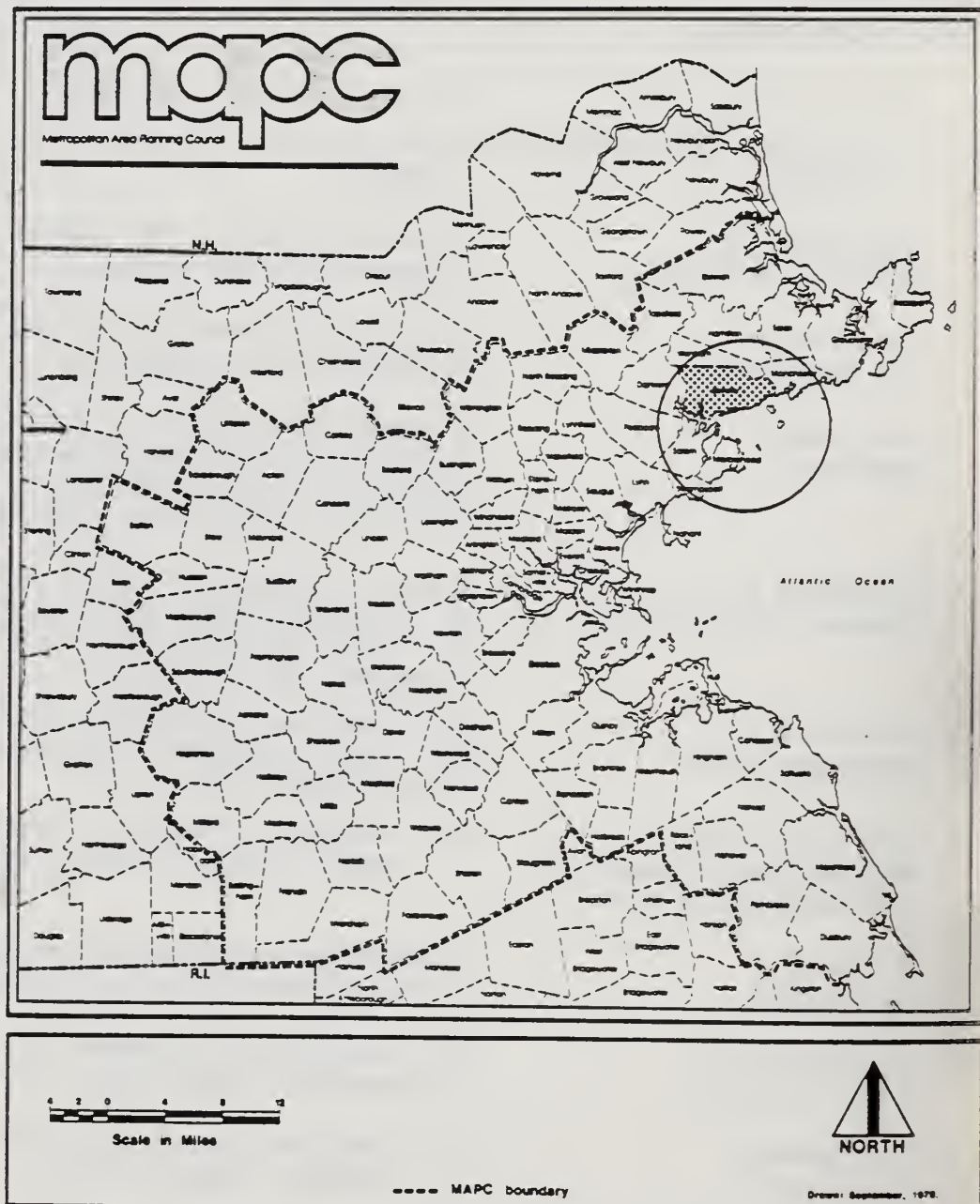
FLOW CHART OF  
THE RE-USE PROCESS

LEGEND OF SYMBOLS:

- local government
- municipal department
- local citizens
- ★ planning tools
- ☆ outside consultants

STEPS	ACTORS
1 Designating a Building as Surplus	□ Custodial Body (ie: school department) ★ Space Needs Survey/Audit
2 Turnover to the Community	● Local government (ie: board of aldermen, selectmen) □ Custodial body transfers
3 Hold Public Hearings	● Local government (ie: board of aldermen, selectmen) □ Municipal departments participate, comment, advise ○ Local citizens participate, comment, advise ☆ Outside consultants (engineers, architects, etc.)
4 Preparing a Request For Proposals	● Local government (board) initiates, sets objectives □ 1 Municipal department coordinates, writes □ Other municipal departments assist/support ★ Request For Proposals
5 Preparing a Developer's Kit	□ 1 Municipal department coordinates □ Other municipal departments support, supply materials ★ Developer's Kit
6 Publication of Request For Proposals and Developer's Kit	□ 1 Municipal department writes and places advertisements, press releases, etc. in local press
7 Proposal Development	□ Municipal departments provide information ☆ Outside developer teams prepare proposals
8 Submission of Final Proposals	□ 1 Municipal department collects (ie: clerk of committees) ☆ Developer teams submit
9 Preliminary Evaluation	□ 1 Municipal department reviews, evaluates, prepares summary chart
10 Evaluation/ Selection	● Local government (board) deliberates, reviews □ Municipal departments participate, advise ○ Local citizens participate, advise ☆ Developer teams make presentations
11 Negotiations	● Local government (board) revises, fine-tunes ☆ Selected developer negotiates

Regional  
Map



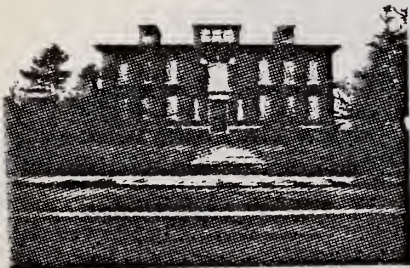


## BACKGROUND NARRATIVE

The history of the Brown, Farms, and Prospect schools parallels the city of Beverly's development from the turn of the century through the 1920's. Their locations and respective dates of establishment chart the patterns of growth and development in the city. The oldest of the three, the Prospect School, was built close to downtown in 1895, one block from the commercial district in a densely settled residential neighborhood. Eight years later, the Farms School was built approximately four miles from the city center in an outlying residential district known as Beverly Farms. The Brown School, built seventeen years after the Farms School in 1920, also lies outside the center, close to the northwestern edge of the city.



The Prospect School is a two-story wood-framed building that sits on a partly sloping  $1\frac{1}{4}$  acre site in the center of a dense residential neighborhood. Its gross building area is nearly 7000 square feet per floor, with a stucco exterior, a plaster interior finish with hardwood trim, and hardwood floors.



Built in 1903 on a graded  $2\frac{1}{3}$  acre site, the Farms School is a two-story masonry building with 7000 square feet of usable space per floor and a full basement. The exterior is red brick and the interior finish is plaster with hardwood floors and trim.



The largest of the three is the two-story Brown School built on three level acres in 1920, it has 8000 square feet per floor plus a full basement. Like the Farms School, its exterior is red brick and the interior finish is plaster with hardwood floors and trim.

The three schools remained in full service until 1978. Faced with declining enrollment, the School Department redistricted the city and the three buildings were declared surplus. The plumbing, wiring, and lighting systems of all

three buildings were completely renovated in 1964. Since the buildings were routinely maintained, they are in good condition overall.

#### THE RE-USE PROCESS: An Account of the Steps

The steps used in the adaptive re-use of the Beverly Schools is a result of both local conditions and municipal and state procedures required by law. Although the circumstances vary from town to town, the general concepts and planning tools demonstrated in the Beverly case are relevant to adaptive re-use in any city or town.

#### Designating a Building as Surplus

As in any adaptive re-use process, the first step is to identify a building as surplus. In the Beverly Schools case, the redistricting of the city in 1978 by the School Committee led to the three schools being identified as surplus facilities. Assistant Superintendent of Schools Alphonso Fortunato said, "The School Committee was faced in 1978, as it still is today, with the decline in school population that many towns in the Northshore and the metropolitan region are experiencing. We have gone from a school population in 1973 of 8300 to last year's figure of 6700. The redistricting of the city enabled us to make more efficient use of our buildings and to keep class sizes somewhat equal. Seven of the other Beverly schools absorbed the students from the Brown, Farms, and Prospect Schools".

The School Committee's decision to close the schools was then challenged by a referendum. After extended discussion of the future of the three school buildings, the referendum was defeated and the surplus designation was upheld.

#### Turnover to the Community

The three school buildings were turned over to the City by the School Committee on August 1, 1978. In accordance with Beverly city ordinances,



the Board of Aldermen began public hearings to discuss suggestions for the future of the properties.

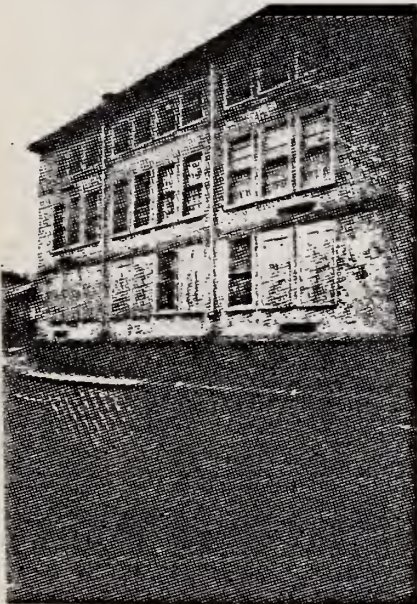
## Public Hearings

The public hearings is the most direct way to begin to generate alternatives for surplus properties. Local governments can use these discussions to begin mapping out courses of action. Several parties should participate:

- Local Departments: As described in the first case study, communities should always consider using surplus buildings for other city departments or activities. (It would be advantageous for the community to assess its own needs for facilities on an ongoing basis. The tools for this kind of internal inventory are presented and discussed in the Technical Appendix.)

In particular, local planning departments or planning boards should be involved in the early stages of the discussions, since they have up-to-date information on the overall planning and development of local properties. In the present example, Frank Garretson, Director of the Beverly Planning Department, was involved in the re-use process from the beginning. He eventually implemented the Request For Proposals approach that the Board of Aldermen decided to use. (The Request For Proposals approach is explained in the next section of this case study.)

- Citizens: As Frances Alexander, chair of the Beverly Board of Alderman, stated "Its usually better to work with local residents from the beginning. We divided discussions into three groups, one for each school. Additionally, we invited all Beverly residents, the meetings, with a special effort to invite residents living next to the three school properties."



Local residents often provide the clearest understanding of the impacts of different proposals and uses. Involving them at an early stage also lessens the possibility of a dispute or misunderstanding in subsequent planning stages.

- ☐ Local Professionals and Experts: The use of local professionals can benefit a planning project in many ways. Local engineers, architects, real estate developers, and designers can all provide professional insights into possible building use. In addition to the professionals employed directly by the municipality, private citizens with relevant professional expertise should be invited to participate.
- ☐ Outside Consultants: Advice is available to communities from a variety of public and private institutions in the region. Architects, developers, and various agencies, particularly those specializing in adaptive re-use, can provide information and experienced advice based on similar cases. For instance, the Massachusetts Historical Commission can provide guidance and information on historic preservation. MAPC can provide referrals and contacts for similar projects in the region. (All sources, public and private, are listed in the Directory of Organizations and Directory of Funding.)

In the Beverly case, the Board of Aldermen contacted the Massachusetts Department of Community Affairs (DCA), who sent a representative to contribute to early deliberations on the three schools. The DCA recommended using the Request For Proposals (RFP) approach for the disposition of the schools for adaptive re-use.



Preparing a  
Request for Proposals  
RFP

The Request For Proposals is a common planning tool particularly useful in adaptive re-use. The purpose of an RFP is to provide outside professionals (in the case of adaptive re-use, architects and developers) with the opportunity to help a city or town develop alternative solutions to problems. In conjunction with a large packet, or developers kit, an RFP provides basic background information on a given problem and invites parties to propose solutions.

The following sections outline a typical RFP and developer's kit, followed by a general discussion of the purposes, advantages, and disadvantages of the RFP approach in practice.

For adaptive re-use, the Request For Proposals includes:

- Background Data on the Project: A typical RFP begins with a short narrative, outlining the general history of the case. In the Beverly Schools case, this included the names of the schools, the process and dates of their becoming surplus buildings, the account of the decision to re-use them, and an introduction to the RFP Approach.
- Statement of the City/Town's Objectives: The RFP should clearly state the local government's objectives in the case. Questions to be answered include: Are the properties to be sold, leased or rented? What uses are considered viable for the properties? Is there a preference for "pure" adaptive re-use or will new construction be considered?

In the Beverly case, the planning department outlined their overall objectives as follows: 1) sale of the three properties; 2) adaptive re-use of the three structures; 3) financial return from the sale and continued use of the buildings; and 4) encouragement of uses that enhance the city and the neighborhoods bounding the three properties. Uses permitted by the Beverly

Zoning Ordinances, or those allowed through conventional variances or special permit procedures would be acceptable to the board of aldermen. Only industrial use, judged incompatible with the residential character of the neighborhoods, was identified in the RFP as beyond consideration.

- Description of the Properties: The RFP should provide a written description of the properties being made for proposals. Their size, configuration, topological features, access, etc. should be identified, as well as adjoining uses. The buildings on the lots should be described, and their condition briefly noted.

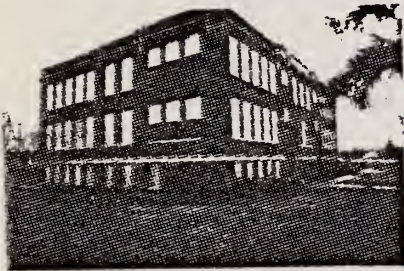
The Beverly Schools RFP provided a full description of each school and property. The descriptions included: construction and condition of the interior and exterior of the building, including floors, walls, windows, and finishes; gross building area in square feet; the age, condition, and maintenance history of the building's major systems; and size, slope, and configuration of the site.

This physical description may be general and need not be quantitative. Generally the developer and consultants will make a more detailed assessment of these features during their own first-hand survey of the properties.

- Conditions of Sale/Criteria for Selection: The RFP should indicate criteria used in evaluating proposals, and conditions for selling the property. This helps establish common ground for discussions and gives a clear notion of final goals.

Additionally, applicable federal, state and local ordinances, plans and regulations, tax guidelines, and time limitations should be made clear at the outset. Also, necessary deposits, fees, and transfer of statements should be identified and explained.

- Content of Submittals: The RFP must state exactly what is expected in the submittals. Questions to be answered are: What information will the community need to make fair and complete evaluations of proposals? What types of presentations are required? What assumptions can be made by proposers? The RFP should describe all required sections of a complete proposal package, using sample forms if possible.
- Procedures: The RFP should outline procedures that communities and proposers must follow for the remainder of the re-use process. Each step would be described, explained, and given, whenever possible, a definite date, time, and place. Included in this schedule should be a list of people to contact about the project, and specific times for inspection of the property. (A sample RFP is included in the Technical Appendices of this handbook.)



#### Preparing a Developer's Kit

The RFP is usually part of a large information packet commonly known as a Developer's Kit. The Developer's Kit packages all the information a proposer will need to develop a full submittal for consideration. It is compiled by the community for temporary loan use, or for sale at a nominal fee. The RFP sometimes acts as a cover letter for the complete Developer's Kit.

The Developer's Kit includes information from several different sources in a community. It is usually compiled by the writer of the RFP. In the Beverly case, both the RFP and the Developer's Kit were coordinated and assembled by the Planning Department. The complete kit, which was available for daily loan or for purchase for \$36.00, included:

- The Request For Proposals.
- City Map: showing the location of the property, adjacent uses, town centers, access, etc.
- Zoning Map: showing the properties, zoning, adjacent uses, districts, etc.
- Zoning Ordinances and Amendments: a copy of the city zoning ordinances, classifications, definitions, amendments, appeals and variances procedures.
- Property Assessments: for each individual property available on parcel-by-parcel basis.
- Site Plans: for each parcel, showing elevation, topography, site dimensions, etc.
- Plans for Existing Structures: complete floor plans, elevations, mechanical plans, etc. for the original building and any subsequent modifications and/or rehabilitations.

The following information, though not absolutely necessary for the developer and his team to be able to prepare a submittal, would be of additional help if applicable and available:

- Photographs of the Buildings: for a quick overall assessment of the site, the building, etc.
- Supplemental Information on the Community's Needs and Preferences: A community may want to encourage a specific use, type of funding, or other special program. General information on such programs, such as historic preservation funds, Section 8 programs, UDAG Grants, 121A Tax Agreements, etc. can help the developer to sense a community's intentions and to construct a more relevant proposal.



- Standardized Forms: Comparative evaluation can be made much easier just by using standardized forms for critical information. For instance, since all developers are customarily required to submit a statement of financial disclosure and capability, it would save time and confusion if all of the information were similarly presented. By developing a standard form or using one such as the HUD-6004, the community can save itself some busy work. (Copies of these are available from The Council or the HUD Area Office, see the Directory of Organizations.)

In general, the RFP and Developer's Kit approach offers communities and developers several distinct advantages:

- The RFP fosters creative approaches and solutions: Rather than mandating specific uses, financing schemes, or architectural solutions, the RFP/DK Approach allows each professional team to choose its own approach, free of pre-determined constraints.
- The RFP can save a community time and money: It is expensive to develop and explore all the possible architectural, use, and financial possibilities for a given property. Such an undertaking may be beyond the capabilities and resources of even the largest cities and towns. Yet, the set of responses to an RFP represent exactly this kind of research effort. Each developer team will take a different approach to the problems identified in the RFP. If enough parties respond to the RFP, the pool of proposals will often represent the full range of possibilities for a given property. In essence, the town has divided the costly task of generating alternatives among respondents and allowed variety to emerge from natural individual tendencies.
- The RFP Approach will force the central issues to surface: Without tangible examples

to work from, it is difficult to fully understand the plethora of issues involved in a re-use case. It is often easier to compare actual working proposals, which include architectural plans and market analyses, than it is to evaluate the merits of abstract, undeveloped alternatives. Actual proposals will provide the community with a working exposure to the full range of design, planning, and economic issues that surround a given re-use possibility.

- ☐ The RFP is a tool for guiding development:  
In addition to zoning, the RFP is a planning tool that can be used to guide the future of the property and possibly, of a major section of town. The RFP can define and establish limits, without inhibiting creative and innovative approaches. The RFP should be written to reinforce local priorities and preferences for growth and change. Rather than selling a property unconditionally, the RFP provides the town with a way of gently but very specifically guiding its future development.

The RFP/Developer's Kit will vary in style, from the open-ended to the highly restrictive. The restrictiveness of an RFP will depend on how much front-end work (research, design development, and decision-making) the town is interested in doing before it is circulated. Generally, a specific RFP (one which narrows the range of choice or interpretation), will require more front-end work which is required both to generate alternative approaches and to decide which ones to eliminate from consideration.

The Beverly Schools RFP was open-ended. Frances Alexander, chair of the Board of Aldermen said, "The intent was to try not to limit the developer's imagination. We didn't want to rule out any fresh or innovative approaches to the problem. Also, we weren't entirely sure what the best use or arrangement would be." Thus, the RFP prepared by Planning Director Garretson did not

even limit the kind of uses that would be considered. No restrictions on funding schemes, tax arrangements, or architectural features were made. No purchase price was established.

In addition to giving the developer a wide range of choices, the open-ended RFP also saved the City of Beverly considerable time and expense by reducing the front-end work required for the RFP. Determining the most advantageous use, architectural configuration, best market approach, and financing schemes, etc., would have required a substantially larger investment of time and resources by both the city and the planning department.

However, the open-ended approach resulted in some disadvantages in the later stages of the re-use process, as shall be discussed.

#### Publication of the RFP and the Developer's Kit

The RFP and developer's kit is then made available to the general public, via press releases or newspaper advertisements inviting interested parties to become involved. (A sample advertisement is included on page 47 of this handbook.)

The Beverly Planning Department placed four small (2" x 3") advertisements in some local and regional newspapers in late September and early October of 1978.

#### Proposal Development

The next stage of the re-use process is proposal development. The developer's kit and RFP provides enough information for a developer's team to prepare a full submittal and sets a deadline and schedule for these procedures.

During this period, municipal departments should be ready to furnish additional information for architects, developers, and financial consultants.

Any area in the developer's kit may need additional clarification or explanation.

In the Beverly case, thirteen (13) parties responded to the RFP. Each party had the option to develop one, two, or all three of the surplus schools. All of these options were proposed.

The thirteen fully developed proposals represents a very successful response. It was a result of a very complete and concise RFP and Developer's Kit, along with a few strategic newspaper ads. The submittals were prepared during a five week proposal development period.

#### Submission of Final Proposals

The proposals are submitted at the designated time and place, as identified in the RFP. By November 10, 1978, the Beverly Clerk of Committees had received thirteen (13) submittals.

#### Preliminary Evaluation

After receiving the complete developer proposals, the community's first major task is to conduct a preliminary comparative evaluation. Comparative listings and recommendations concerning different aspects of the proposals help expedite the selection process to follow.

In the Beverly case, Planning Director Garretson reviewed the proposals and prepared a summary report for the Board of Aldermen to use in their selection deliberations. Each proposal was listed according to school(s) chosen, (Brown, Farms, and/or Prospect), type of construction (new or rehab), purchase price, tax, proposed use, permits, financing, time schedule, experience, design quality, etc. Comparative charts were then compiled for easy reference.



The residential character of the schools' neighborhoods must have made a lasting impression on the developers; all thirteen submittals proposed to re-use the school buildings for housing units. Even within this one uniform feature there was great variety:

- ☐ Six proposals included some or all new construction in addition to or instead of adaptive re-use construction.
- ☐ Six proposals included condominiums as an immediate resale approach to the properties.
- ☐ Three proposals included elderly subsidized housing units.
- ☐ Four proposals suggested the use of Section 8 funding subsidies.
- ☐ One proposed that the city enter into a 121A Tax Agreement with the developer.
- ☐ The purchase bids varied by over \$500,000.00
- ☐ Construction and rehabilitation estimates varied by over \$2.5 million.

Reflecting on this stage of the process and the RFP, Garretson said, "It became clear to me that we might have some problems. Since the RFP was open-ended, the variety of proposals made it like comparing apples and oranges. There was great variety in many different ways and this made them difficult to compare." Thus, the savings in front-end time and expense in developing the brief and unrestrictive RFP can lead to a highly variable product that can prove difficult to evaluate and compare. Garretson observed, "One might want to do more in the beginning, so there is a clearer idea of what will be looked at in the end."



## Evaluation & Selection

The Board of Aldermen then began a detailed review of the proposals. The Board invited each developer to make a presentation of its proposal. These presentations were held over a single weekend.

As discussions developed, several general goals emerged:

- To minimize the time delay
- To curb future demands on city services (i.e.: large family apartments would increase demand for schools, whereas office use would not)
- To provide the use most compatible with each property's immediate neighborhood and environs.

A Finance and Property Committee was appointed by the Mayor to work in conjunction with the Board of Aldermen. Comparing the proposals was often difficult. Choices had to be made between "apples and oranges;" rental apartments versus condominiums; bids on one of the three schools versus package bids on all three schools, and initial purchase prices (which varied by one half million dollars) had to be compared to projected long-range financial benefits and disbenefits associated with each proposal.

Eventually, the Board of Aldermen and the Finance and Properties narrowed the field to three finalists. Some of the key considerations in this process were:

- The desire to develop all three schools with a minimum of negotiations and arrangements. Thus, those who did not propose re-use of all three schools were removed from consideration.
- The City of Beverly already had several applications for Section 8 project pending. The Board decided that it did not want the re-use of the Brown, Farms, and Prospect

Schools to be dependent on federal subsidies.

- Participants indicated a strong preference for permanent residential use (i.e.: condominiums) rather than short-term, higher-turnover rental units. It was felt this would be most compatible with the existing neighborhoods, which are established owner-occupied areas.

In the end, developer Leventhal-Conant Associates, and Architect Drummey, Rosane, Anderson, Inc. were chosen developer and architect, respectively. Although they did not make the highest purchase offer, Frances Alexander said, "The total proposal was judged to provide the city with the best use of the properties."

## Negotiations

Any RFP selection is followed by detailed negotiations between the community and selected developer. These discussions focus on purchase price, time schedule, intended uses, etc. Rarely will a proposal be perfectly acceptable in its originally submitted form. Both parties inevitably learn more about the problem by participating in the process of evaluating the full range of the proposals. The community should accept the best overall proposal, even if it has some minor flaws or ambiguities. The negotiations stage can be used to resolve these differences.

In the Beverly case, the Leventhal and Conant proposal originally included a membership squash court at one of the schools. Because this would involve both use and income from non-residents, it was disallowed.

Also, during this stage, a variance was required to use the schools as multi-family residential clusters below the dwelling unit-per-acre ratio zoning in each neighborhood. Issues to be



considered included height limitations, driveway setbacks, etc. This petition, like any other, was handled by the Board of Appeals of the Zoning Ordinance.

Based on local need, community officials can modify conversion plans. In the case of a proposal calling for housing, for example, an agreement between the town and the developer could set aside some units for low and moderate income households. Some units could be subsidized through federal and state subsidy programs for use by low and moderate income families, the elderly, or the handicapped. The conversion of the three Beverly schools to market rate condominiums, for example, could be modified to allow occupancy of some or all of the units at below market rates.

#### SUMMARY & COMMENTARY

The Beverly schools case is an excellent example of the RFP/Developer's Kit approach to adaptive re-use. With a relatively small investment of the city's resources, private developers were able to generate a full range of alternatives for the local government's consideration. The entire process, from RFP to selection of developer, required approximately six months.

The process may have been improved with more front-end work and a less open-ended RFP. Although this requires a stronger commitment of time and resources from the city, the responses to the RFP may have been more uniform in strategy and more easily compared.

The circumstances of each case, along the local planning "style" does much to dictate the specificity of an RFP. However, the more open-ended an RFP, the more attractive the opportunity will appear to prospective developers. Likewise, an RFP that narrowly specifies a particular use, type of funding, purchase price, or tax arrangement will appear restrictive and confining,



and may seem uninviting to a potential developer.

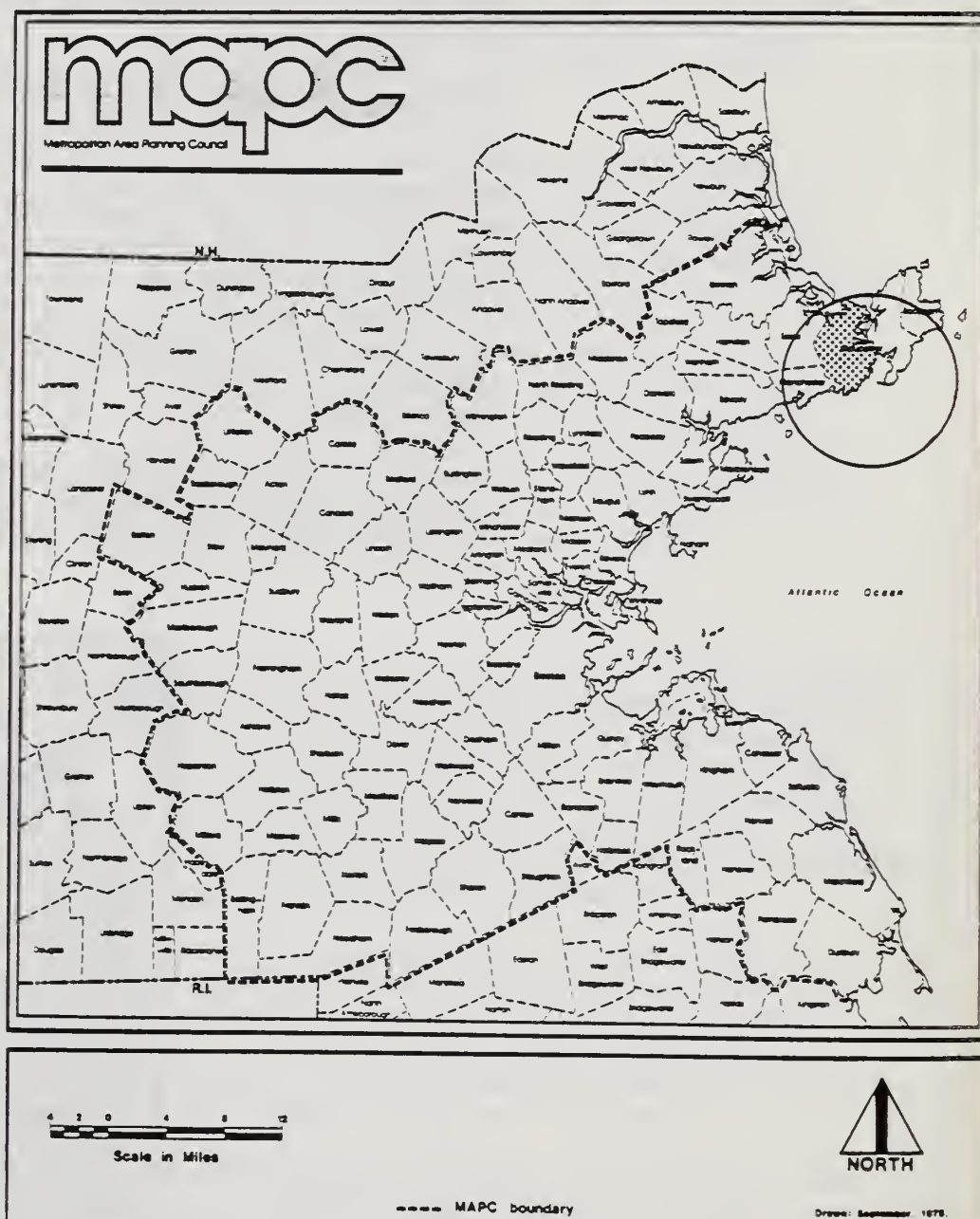
In the Beverly case, the healthy response to the RFP was as much a result of the high desirability of the buildings as it was of the excellence of the process. A highly desired building or property presents an opportunity for the community to be more definitive in their RFP. In contrast, a building which promises to be difficult to re-use could be significantly helped through the process by a very open-ended and inviting RFP.

Samples of the two fundamental planning tools, presented in this case study, the RFP and the Developer's Kit, are included in the Technical Appendix to this handbook.

*Feb 1, 78* **CITY OF BEVERLY  
ANNOUNCEMENT  
REQUEST FOR PROPOSAL  
FOR SURPLUS CITY SCHOOLS**

The City of Beverly, Board of Aldermen, are seeking proposals for the purchase and adaptive re-use of three former City Schools; the Brown School at 38 Copart Street, the Fenne School at 66 Haskell Street, and the Prospect School at 12 Pickett Street. The REQUEST FOR PROPOSAL (RFP) is available at City Hall, Clerk of Committee Office, 181 Cabot Street, Beverly, MA 01818. A kit containing information on the schools and site is also available for viewing at this same location by appointment during normal working hours or may be purchased for a nominal fee. Proposals are due on November 10, 1978. Proposals must be made for individual schools. Recommendation will be made by an evaluation committee. Selection will be by the Board of Aldermen. Selection criteria will include purchase price, anticipated tax return, and the positive impact the project will have on its neighborhood and the City. Proposals for industrial uses will not be considered. Proposals will be reviewed for a period of sixty (60) days, or less, for the purpose of evaluating the proposals and investigating the qualifications of the developer.

## Regional Map



## Case Study 3: Gloucester

Our first case study outlined the basic processes and concepts in adaptive re-use, illustrated through a simple story of a local in-house conversion. Case Study Two layered several more features over that basic theme -- coordinated action by the city/town departments, interaction with outside professionals, a working knowledge of funding arrangements, and the sensitive interpretation of local zoning ordinances. The two most important planning tools, the Request for Proposals and the Developer's Kit, were also introduced.

The third case study adds another dimension to the arena of adaptive re-use: historic preservation and restoration. What new factors are introduced to the re-use equation when a building of historic significance is involved? Case Study Three, which focuses on the restoration and adaptive re-use of the Blackburn Tavern Building, in Gloucester, Mass., addresses this issue in practice.

### BASIC DATA:

Building Name:	Blackburn Tavern Building, 1810 originally known as the private residence of James Tappan
Address:	Washington and Main Streets
Community:	City of Gloucester, Mass. established 1623 population: 27,209 (1975 est.) per capita income: 3114 (1974)
Original Use:	Tappan Residence (private home) 1810-28 Gloucester Hotel (inn) 1810-40 Mason Hotel (inn) 1840-1901 Community House (com. center) 1905-1920 Atlantic House (meeting hall) 1920-1922 Puritan Hotel (inn) 1923- Vacant through until 1975 Blackburn Tavern (tavern, rest.) 1976-pres.
New Use:	(presently under construction)

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BASIC DATA:	New Use:	Restaurant/tavern/pub (Blackburn) Offices
	Construction:	Residential apartments (2) Red brick on granite foundation with internal structure of heavy timber smaller structure on interior of stone of conventional wood frame
	Original Architect:	unknown
	Re-use developer:	Sea Rock Estate Manchester, Mass.
	Re-use architect:	I.W. Colburn Manchester, Mass.
	Engineer:	n.a.
	Consultants:	none



# LOW CHART OF THE RE-USE PROCESS

## LEGEND OF SYMBOLS:

- local government
- municipal department
- local citizens
- ★ planning tools
- ☆ outside consultants

## STEPS

## ACTORS

- |  |   |
|--|---|
| 1 Assessing the Building                                 | <input type="checkbox"/> Municipal departments (assessor's, building department, engineer)<br>☆ Outside architect, engineer<br>☆ Building owner (if not municipally-owned)<br>★ Building Evaluation Forms                 |
| 2 Investigating the Historic Value of the Building       | <input type="checkbox"/> Municipal department<br>☆ Outside professionals/consultants/agencies (ie: MHC, local historical society, commission, architectural historian, etc.)  |
| 3 Contact or Establish a Local Historical Commission     | ● Local government sponsors, supports establishment.<br>○ Local citizens, form study committee<br>☆ Outside professionals (MHC)   |
| 4 Consider Applying for Listing on the National Register | <input type="checkbox"/> Municipal department could coordinate application<br>☆ MHC, local historical commission, architectural historian<br>☆ Building owner (if not municipally-owned)                                  |
| 5 Proposal Development                                   | ● Municipal owner--sponsor an RFP process<br>☆ Developer, architect, financial analysts<br>☆ Building Owner (if not municipally-owned)<br>Request For Proposals/Developer's Kit   |
| 6 Seeking Funds  | ● Local government endorses<br><input type="checkbox"/> Municipal department/staff coordinates search (community development dept., planning staff)<br>☆ National Trust for Historic Preservation, SPNEA, ACT, MAPC, etc. |
| 7 Implementation   | <input type="checkbox"/> Municipal department as project manager<br>☆ Outside contractors, architects, etc.<br>☆ Building owner (if not municipally-owned)  |

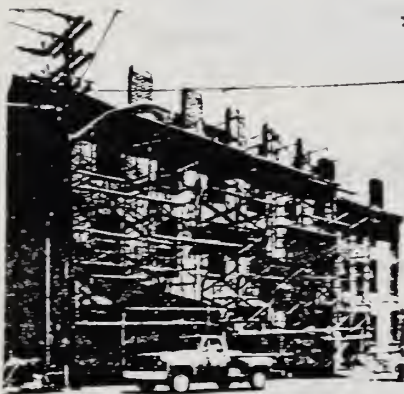
## BACKGROUND NARRATIVE

The history of the Blackburn Tavern Building is colorful and varied. According to Frannie Colburn, wife of the re-use architect and current owner, it was built originally as a private residence by James Tappan circa 1810. The stately brick house at the intersection of Washington and Main Streets offered spectacular views of Gloucester's picturesque Inner and Western harbors. The original structure had a rectangular plan, 40' x 60', with three full floors and a basement. The solid granite foundation, red brick walls, taut roofs, and multiple chimneys were typical of this time in American architecture, which has become known as the Federalist Period.

The building changed hands several times without significant alterations until 1828. In that year, the Mason Family of Cambridge acquired the building and began operating it as an inn. It was first called the Gloucester Hotel and later become the Mason Hotel. During the mid 1800's, the first of the Shephard Markets leased the ground floor. Sometime after 1840, the Mason family added a new 1908 square foot wing on the north side of the original building (along Washington Street) and nearly doubled the inn's capacity. The floor plan of the new wing, with a long central hallway flanked with small rooms on either side still remains today. The building remained in the Mason Family until 1901 when it was sold to George J. Tarr of Gloucester.

From 1901 until sometime after World War I the building was used as a community center and became known as Community House. Most of the upper rooms were vacated, and were to remain unoccupied and untouched for seventy years -- until the re-use that is presently underway began just last year.

The lower portion of the building continued to serve a variety of uses and needs. In the early 1920's, the building was used as a meeting and recreation hall for the mine force of the North Atlantic Squadron. During this period the building was known as the Atlantic House. In 1923 the Tarr



Family sold the building to the Barkas Family, who then operated an ice cream parlor and sandwich shop. It remained in the Barkas family for over fifty years, and was known in later years as the home of Captain Bill's Restaurant.

In 1975, the building was bought from the Barkas Family by the Ahearn Family. It served briefly as a pub known as the Puritan House before it was sold in December, 1977 to its present owner, Mr. Ike W. Colburn of Manchester, Mass. Before selling the building, Mr. Ahearn was successful in getting the building listed on the National Register of Historic Sites.

#### THE RE-USE PROCESS: An Account of the Steps

Although the protagonist in this case is a private individual and not a municipal government, the process for re-using a building of historic significance is essentially the same. The events recounted through the Blackburn Tavern Building case will provide the basic procedural ideas. More detailed and up-to-date information, and guidance on the nomination, listing, and funding of historic building projects is available from many agencies and organizations specializing in this area. The Massachusetts Historical Commission, which is the state administrative branch of the National Trust For Historic Preservation, should be consulted for any of the latest procedures to use in planning a re-use process for a building of historic merit.

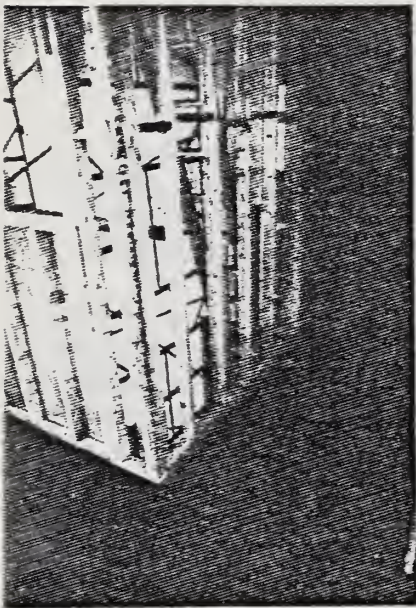
#### Assessment of the Building

As in any adaptive re-use project, the first step is to assess the building's basic viability. As discussed in Case Study One, several aspects of the building should be professionally evaluated, including its fundamental structural condition, its interior and exterior appearance, and condition, the type and condition of the major systems, (heating, ventilation, wiring, plumbing, etc.), the available areas for reclamation, necessary site improvements, etc. Although this early evaluation need not be extensive, it should anticipate all major



potential problem areas. (Sample Building Evaluation Forms are included for reference in the Technical Appendix of this handbook).

By 1978, the Blackburn Tavern Building had changed ownership at least eight times and had served innumerable uses. There are now three distinct sections of the building; the original brick Tappan mansion fronting on the corner of Main and Washington Streets, the red brick hotel addition, fronting Washington Street, and an auxiliary wood-framed house in the interior of the site.



Investigating the  
Historic Value of  
the Building

As a practicing architect, owner I.W. Colburn was able to make the preliminary assessment of the Puritan House with the assistance of a consulting engineer. He saw that the two brick structures were basically sound. The original building and the later addition both sat on solid, granite foundations. Many of the upper floor rooms remained in their original state, and required only cosmetic changes. Almost all of the interior walls were remarkably square and true. However, the wood frame building on the interior seemed less substantial. The exterior of the building was deteriorating, and the overall structure appeared to bow and sag. Colburn knew this building would be a gamble and that he could assess the structure's viability only after exploring and examining the structure from within. The quality of the original buildings still made the risk on the wood frame structure worth taking.

It would be a tragic loss to demolish or disfigure a national or local historic resource, and doubly painful to do so unwittingly. Also, official recognition of a building as a national historic treasure carries financial advantages for the community, the developer, and the building owner. Federal and state monies are available for the survey, planning, acquisition, restoration, and rehabilitation of historic structures. Additionally, the Tax Reform Act of 1976 creates favorable tax incentives for the preservation and



rehabilitation of buildings and structures listed on the Historic Register. An explanation of this strategy is included in the Directory of Funding, p. 89 of this handbook.

#### Contact or Establish a Local Historical Commission

To initiate the listing of a property, first contact the local historical commission, historical society, architectural historians, or one of the preservation organizations listed below. If no local historic commission exists, one should initiate the process of establishing one. In order to administer federal historic preservation funds through the Massachusetts Historical Commission, a public historical commission must exist in the applicants' town. A private historical society does not fulfill this requirement.

A building need not be individually spectacular or unique to be of historic value. It may simply be a typical example of the architecture of a particular era, region, use, or architect whose work the National Trust is interested in documenting and preserving. Structures can be placed on the National Register through any one of several categories-- including thematic group nominations, historic district designation, and individual listings.

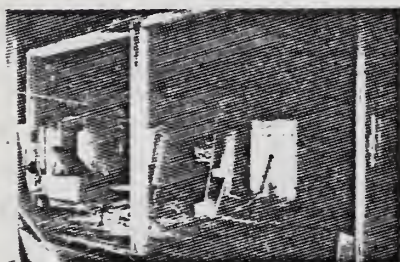
The Gloucester Historic District Commission was established, coincidentally, by manager and part owner of the Blackburn Tavern, Patrick Salony. Long interested in restoration and rehabilitation of older buildings, he participated in the study committee to form the commission, and served as the Historic District Commission's first chairperson.

#### Consider Applying for Listing on the National Register

There are several local, state, and federal organizations specializing in historic preservation. These groups should be contacted for the specifics of application for listing on the Register and/or funding opportunities:

National Trust for Historic Preservation  
New England Field Service Office  
Office of State Planning (OSP)  
Society of the Preservation of New England  
Antiquities (SPNEA)  
Massachusetts Historical Commission (MHC)  
Architectural Conservation Trust (ACT)

A complete description of the activities and programs of these groups is included in the Directory of Organizations of this handbook.



In Gloucester, the Blackburn Tavern Building was placed on the Historic Register by Frank Ahearn, owner of the building from 1975 to 1977. In the course of the massive interior renovation for the new pub he was opening, Mr. Ahearn discovered the structure's unique character when non-structural plaster walls were removed from within. Working closely with his contractor and the Massachusetts Historical Commission, Mr. Ahearn researched the history of the structure and made an application to the National Register. The building was listed on the National Register of Historic Sites in 1977 under the name of the Puritan House and Pub, 1810, as an outstanding example of Federalist Period architecture. The listing, of course, made the structure eligible for historic preservation funds.

Thus, when I.W. Colburn acquired the building, it was already listed on the Historic Register. However, his wife, Frannie continued to investigate the building's history, eventually uncovering facts and stories about the structure that were unknown at the time of its nomination and listing on the Register. More than just a personal inquiry, Mrs. Colburn's fact-finding provided a deeper understanding of the building and influenced the planning and design of the building's re-use and restoration. For example, Mrs. Colburn confirmed the fact that the Blackburn Tavern Building was originally a private residence, and not an inn, as was commonly believed. As a

result, architect Colburn is using various architectural and construction techniques to accentuate the distinction between the original Tappan Residence and the later inn addition.

#### Proposal Development

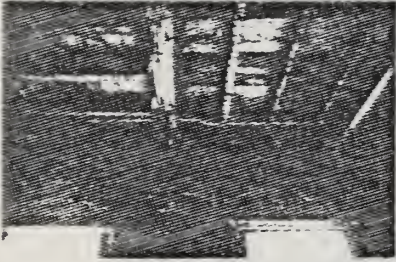
The process for proposal development can be initiated once the historic status of the building is known. A listing on the National Register constrains all exterior changes in preservation and restoration. Knowing the building's status will prevent the premature development of any schemes that would disqualify the re-use from funding or jeopardize the Historic Register listing.

For the developer or owner, this stage of the process consists of the conventional design development and market analysis. Colburn remembers making an informal survey in Gloucester and finding virtually no office space. He decided, as he said, "to take a bit of a gamble on the building and make it into a first class office building." The plans for the estimated \$300,000 renovation and re-use include an expanded Blackburn Tavern with entertainment hall, office spaces, and two rental apartments.

Market analysis has a special importance in the expanding world of re-use and historic preservation. Architect Colburn observed, "Its becoming clearer and clearer that adaptive re-use, particularly historic preservation, must be conducted with an awareness of the market. Whatever you put in a building, it has to be alive, viable, and it must address real needs. We can no longer approach historic preservation as just museum-making."

For the municipal owner, two viable routes are available at this stage. The municipality can assume a sponsorship role and conduct adaptive re-use as outlined in Case Study I; or initiate a Request for Proposals/Developer's Kit process





and invite private parties to make submittals as illustrated in Case Study II. The standard processes already outlined in the two case studies could be followed until a complete package is produced, either by the community itself or by private parties making submittals. In either case, federal programs make funds available for the planning and proposal development stage, most notably the Consulting Services Grant Program of the National Trust For Historic Preservation. (The Directory of Organizations and Directory of Funding of this handbook should be consulted for more complete information).

### Seeking Funds

Again, the following organizations should be consulted for the best information on various funding programs that might be applicable to your project:

- National Trust for Historic Preservation
- New England Field Service Office
- Office of State Planning
- Society for the Preservation of New England Antiquities
- Massachusetts Historic Commission
- Massachusetts Department of Community Affairs
- Architectural Conservation Trust
- Metropolitan Area Planning Council

Of particular interest in this genre of adaptive re-use is the Historic Preservation Grants-in-Aid of the U.S. department of the Interior, administered in Massachusetts by MHC. These are federal funds allocated to the state and awarded through the MHC to local governments, private organizations, or individuals as matching grants-in-aid of up to 50 percent.

The funds can be used for survey and planning, acquisition of historic properties, and/or the development, protection, rehabilitation, and



restoration or historic properties listed on the Historic Register.

The actual details and procedures for these grants-in-aid can be obtained from the MHC. In general, a successful applicant must pass two competitive screenings. One through MHC at the local (state) level, and one at the federal level, where the National Park Service of the Department of Interior reviews all plans and specifications for the construction and restoration and passes judgement on the award of the grant.

In the Gloucester case, the City and the private owner worked together in seeking funds. Colburn remembers "only enthusiasm and complete cooperation from the City." The City staff for grants and government funds helped coordinate Colburns application for a \$40,000 Historic Preservation Grant-In-Aid for the interior and exterior renovation of the building. The application was accompanied by letters of support from the Gloucester Planning Commission, Historical Commission, Office of the Mayor, and local banks.

The healthy community of programs and organizations that support, promote, fund, and advertise historic preservation sometimes creates the false impression that funding for projects is easily and automatically available. However, this is hardly the case-- the competition for historic preservation funds grows fiercer by the year. Patrick Salony, member and co-founder of the Gloucester Historic District Commission, and part owner of the Blackburn Tavern, feels "these funds should be regarded as icing on the cake-- as extras. A project should be able to stand on its own feet financially-- to be able to survive on the market after rehabilitation. It would be a mistake to plan a project whose very success or failure depended on historic preservation funds."

Aside from the special funding programs available to the adaptive re-use project on an historic

Implementation &  
Historic Preservation  
Re-use



building, the other aspects of the planning process are quite conventional. A private developer should follow the conventions dictated by professional practice and local ordinances regarding permits, zoning variances, etc. The municipal owner, whether in sponsoring as adaptive re-use directly, or managing an RFP/Developer's Kit process, will follow state and local regulations regarding public hearings, committee and department review, appeal period, etc.

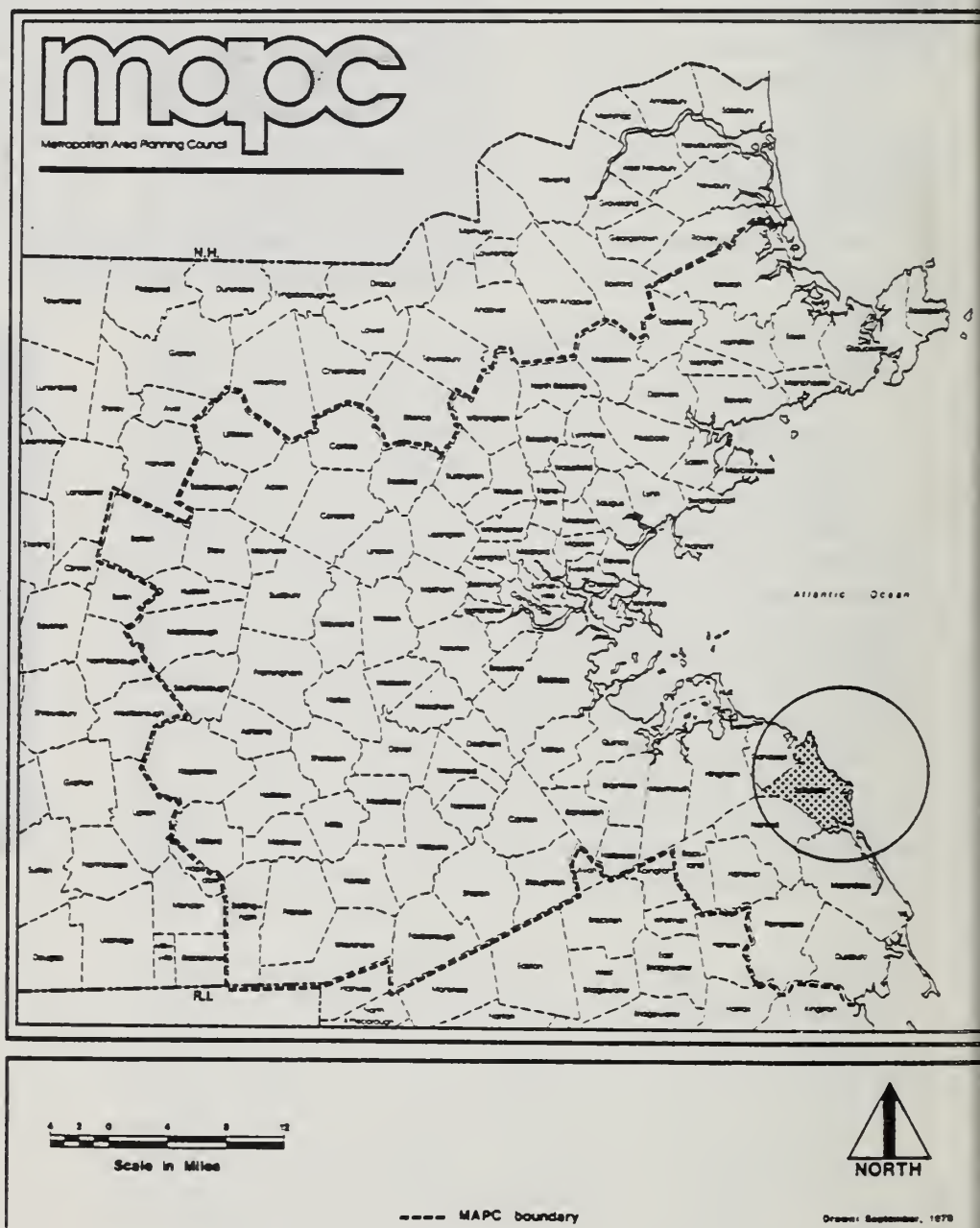
Adaptive re-use of a building with historic significance must be implemented with special patience and concern. As each wall, floor, and ceiling is stripped, opened, or removed, unexpected problems or treasures might present themselves. At the Blackburn Tavern Building, Colburn discovered a set of exterior shutters in perfect condition stacked neatly in an obscure part of the attic. A shortage of storage area for the tavern may have been resolved when careful internal disassembly of the wood frame auxiliary house revealed an intermediate space of four feet sandwiched between two floor levels. Traces of the original kitchen ovens on the first floor, built directly into the back wall, led Colburn to plan for an additional fireplace in its old image. In short, one should expect the unexpected, using surprises as an opportunity to create something truly unique.

Colburn feels that the most important consideration in historic preservation is maintaining the original architectural spirit of the structure. He explained, "It's not necessarily the authenticity that matters. It's the spirit of the style and the period that must be preserved. In some cases, practical constraints require that different portions of a building be updated or changed, but given the right kind of talent this can usually be done in a manner that maintains or enhances the spirit of the building. When you can maintain the historical and architectural integrity of a building and also re-use it and made it financially viable -- then you've really got something."

SUMMARY &  
COMMENTARY

Historic preservation is a special genre of adaptive re-use. Although usually the most difficult, it often leads to the most spectacular results. Historic preservation and its influence on the adaptive re-use process, particularly through funding opportunities, are the central themes of the third case study. The case was written to identify the types and sources of funding and to show how these are integrated with other adaptive re-use techniques developed in this handbook.



Regional  
Map

## Case Study 4: Scituate

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Our first case studies examine actual adaptive re-use projects--one completed (Marblehead), one in planning process (Beverly), and one currently under construction (Gloucester). The fourth case study of Scituate, Massachusetts, focuses not on a specific re-use example, but on an overall strategy for the management of public buildings. The case illustrates a strategy any community could implement at any time -- whether it is faced with immediate re-use possibilities or not. The techniques introduced in this case will help a town to become prepared for all kinds of demands on their public buildings.

### BASIC DATA:

Building Names:	All buildings owned by the Town of Scituate
Addresses:	vary
Community	Town of Scituate, Mass. established 1633 population: 17,899 (est. 1975) per capita income: 3464 (1974)
Original Uses:	vary
New Uses:	vary
Major Actors:	Board of Selectmen Building Space Survey Committee Town Departments

FLOW-CHART  
OF THE BUILDING  
MANAGEMENT PROCESS

LEGEND OF SYMBOLS:

- local government
- municipal department
- local citizens
- ★ planning tools
- ☆ outside consultants

STEPS	ACTORS
1 Appoint a Study Committee	<ul style="list-style-type: none"> <li>● Local government (board of aldermen, selectmen)</li> <li>□ Municipal departments all represented</li> </ul>
2 Inventory of All Municipally-Owned Buildings	<ul style="list-style-type: none"> <li>□ Building Space Survey Committee</li> <li>□ All municipal departments participate, assist</li> </ul>
3 Assess the Community's Present and Future Space Needs	<ul style="list-style-type: none"> <li>□ Building Space Survey Committee</li> <li>□ All municipal departments respond, participate</li> <li>★ Space Needs Survey Forms</li> </ul>
4 Circulate Questionnaires	<ul style="list-style-type: none"> <li>□ Building Space Survey Committee writes and circulates through local press</li> <li>○ Local citizens advise</li> </ul>
5 Evaluate Each Property's Physical Condition	<ul style="list-style-type: none"> <li>□ Building Space Survey Committee (or sub-committee)</li> <li>□ Engineering department, building department,</li> <li>☆ historian, etc.</li> </ul>
6 Hold Public Hearings on Individual Buildings	<ul style="list-style-type: none"> <li>Building Space Survey Committee</li> <li>All municipal departments participate, advise</li> <li>Local citizens participate, advise</li> </ul>
7 Develop Recommendations and Plans of Action	<ul style="list-style-type: none"> <li>□ Building Space Survey Committee</li> <li>□ All municipal departments participate, advise</li> <li>Local citizens participate, advise</li> <li>○</li> </ul>
8 Prepare a Final Report	<ul style="list-style-type: none"> <li>□ Building Space Survey Committee prepares</li> <li>● Local government (board) receives final report</li> </ul>



## BACKGROUND NARRATIVE

The Town of Scituate, Massachusetts, as most of the South Shore Subregion, has undergone tremendous growth and change in the last few decades. Since 1950, the town's population has increased approximately 200 percent. This rapid growth exerted relentless pressure on the stock of public buildings. The years of constant growth demanded new schools, fire stations, police facilities, libraries, pump stations, and office buildings. These new needs and new structures left a number of older structures obsolete, some vacant.

Confronted with this mixture of new and old buildings, the Scituate Board of Selectmen decided to initiate a comprehensive effort to manage the town's public buildings.

## THE RE-USE PROCESS: An Account of the Steps

The first task is to create a committee to conduct the overall assessment and building audit. The Board of Selectmen or Board of Aldermen should appoint a committee large enough to handle the tasks expected for the number of buildings in the town inventory. In formulating the committee, the Board should make an effort to ensure that the following types of expertise and interests are represented:

### Appoint a Study Committee

- Planning Department
- School Committee/Department
- Building Inspector/City Engineer
- A local architect
- Legal Consultant
- Financial Consultant/Developer
- Historical Commission

The Scituate Building Space Survey Committee (BSSC), appointed by the Board of Selectmen on June 8, 1977 consisted of seven members. Five were appointed by the Board of Selectmen and one each by the Planning Board and School Committee.

The Committee should be formed with specific tasks and responsibilities. These are itemized and discussed in the sections below.

#### Conduct an Inventory of all Municipally- Owned Properties

The first step: an inventory of all town-owned buildings. A summary chart indicating their use, address, and current status (occupied, vacant, leased, rented) should be produced. Classification of the buildings by city/town department or custodian will help keep them organized.

The BSSC of Scituate compiled a list of fifty-three (53) properties, classified them into ten different town departments, and listed each department's facilities by building name and address.

#### Assess the Community's Present and Future Space Needs

The next step: assess of the space needs of all town departments, committees, boards, and public service organizations. A Space Needs Survey can be developed and sent to each group requesting an evaluation of their current situation and projected needs over ten years. Groups should be asked about the amount and type of space they require, what other groups they need to be near, what kinds of activities and facilities they could share with others, etc.

Although the response to the Space Needs Survey in Scituate was spotty, several central concerns were communicated to the committee:

- ☐ The Department of Public Works requested the consolidation of its department into one facility.
- ☐ No significant growth in town office space was expected for the next ten (10) years.
- ☐ Departments sharing space requested new arrangements with separate offices.



(A sample Space Needs Survey is included in the Technical Appendix of this handbook as a reference.)

Circulate  
Questionnaires  
through the  
Local News Media

The BSSC should consider placing questionnaires in local newspapers which seek public opinion on space needs of other quasi-municipal groups, or suggestions for the disposition of certain properties.

Newspaper advertisements or questionnaires can be particularly effective in dealing with an abandoned or ignored facilities in populated neighborhoods. An isolated structure may seem totally obsolete to town officials, but neighbors and residents near the buildings may have developed a liking for the structures and may have some creative ideas for re-using them. This technique can be an effective way of soliciting these ideas.

Evaluate Each  
Property's  
Physical Condition

While the BSSC is soliciting comments, requests, and suggestions from user groups and the general public, a physical evaluation of each structure should also be undertaken. The committee or a sub-committee should visit and inspect each property and structure and file a standardized evaluation and inspection report. The inspection should include an assessment of the building's basic structural viability, HVAC systems, plumbing, wiring, lighting, health and safety features, interior finish, exterior condition, etc. (A sample Building Evaluation Form is included in the Technical Appendix of this handbook.)

Hold Public Hearings  
on Individual  
Buildings

Some properties can only be used in limited ways. Some may even require immediate demolition for safety reasons. The fate of other buildings may not be as easy to decide. The BSSC should establish a schedule of open hearings on each of these properties. Local citizens and all municipal departments,



committees, and groups should be invited. Special care should be taken to invite residents living or working adjacent to each property as it is discussed. These hearings will produce a set of standard options--sell, lease, demolish, continue as is, rehabilitation, re-use, etc. A strategy should be plotted out for each property considered.

The Scituate BSSC held approximately thirty-five (35) open meetings. Special hearings, arranged for important and/or controversial buildings, were advertised in the local press. Questionnaires on specific properties were also distributed. Some key buildings and their sample recommendations were:

- ☐ Central School: voted surplus by the School Committee and recommended by the BSSC for conversion to town offices.
- ☐ DPW Garage: recommended sold, and use moved to new site. (It was for storage of vehicles and vehicle-related materials.)
- ☐ Town Hall: considered inadequate for present purposes, with too much office sharing. BSSC recommended that the town offices be moved to the Central School and the Town Hall be sold for conversion to private offices.
- ☐ G.A.R. Hall: recommended for sale.
- ☐ Old School House: presently used by a non-profit organization. BSSC expressed reservations about the town serving as landlord to local non-profit use, and recommended its sale to the present occupant for \$1.00.



Develop Recommendations  
and Plans of Action

Specific recommendations, including legal and financial considerations, should be developed for each property. This can be achieved through the Committee's deliberations, or in the case of

popular or controversial buildings, through the process of public hearings and questionnaires. Some of the recommendations can be categorized: "to be sold"; "to be demolished"; "to be retained for continued present use"; "to be transferred from one department to another"; or "to be adaptively re-used". These special cases should be given independent write-ups summarizing the deliberations and recommendations.

The Scituate BSSC recommended the outright sale of eleven (11) buildings, the demolition of three (3) structures, the continued status of twenty-six (26) (half of the total list) and special arrangements (re-use, transfer, special sale) for the remaining thirteen properties in the town inventory.

Prepare a  
Final Report

In addition, recommendations can be made for new construction or for organizational re-arrangement. The Scituate BSSC recommended the construction of a new garage facility, the creation of a Scituate Historical Commission for historic preservation purposes, and the formation of a Building Maintenance Department under the Town Administrator.

The BSSC should submit a final report to the Board of Selectmen or Board of Aldermen upon completion of its work. It should include the following types of information:

- ☐ Inventory of Town Buildings.
- ☐ An Account of the Work Process -- explaining the committee's actions, the response, results, etc. Included here are accounts and results of the space needs surveys, the questionnaires, the public hearings, the building condition evaluations, etc.
- ☐ Summary and Recommendations regarding: 1) Each individual property and strategy for implementation; 2) New construction required by new or changing needs; 3) the town's

role in regard to its buildings (i.e.: should it act as a landlord?); and 4) organizational issues--other committees, commissions, etc. that should be established to manage or implement the recommended strategies.

- Legal and Financial Considerations: The BSSC might include some brief information on the legal considerations of the options on town-owned buildings. As well, the committee should identify available funding sources and delineate some strategies for the town to take advantage of them in managing the town-owned buildings.

The final report gives the town officials and the general public a tremendous amount of information for decision-making. All the information will be easily accessible and written in the context of the town's comprehensive assessment of its building stock.

## SUMMARY & COMMENTARY

The Scituate Building Space Survey Committee is a superb example of "preventive planning." Rather than waiting for a crisis, the Board of Selectmen used the Committee's work to anticipate future demands for public facilities and to compile a data base for making informed decisions. The BSSC found half the town's public buildings could be better used through other arrangements. Of the town inventory, only twenty-six of the original fifty-three listings were left unchanged. The work required little expenditure and was well within the capability of a small city or town.

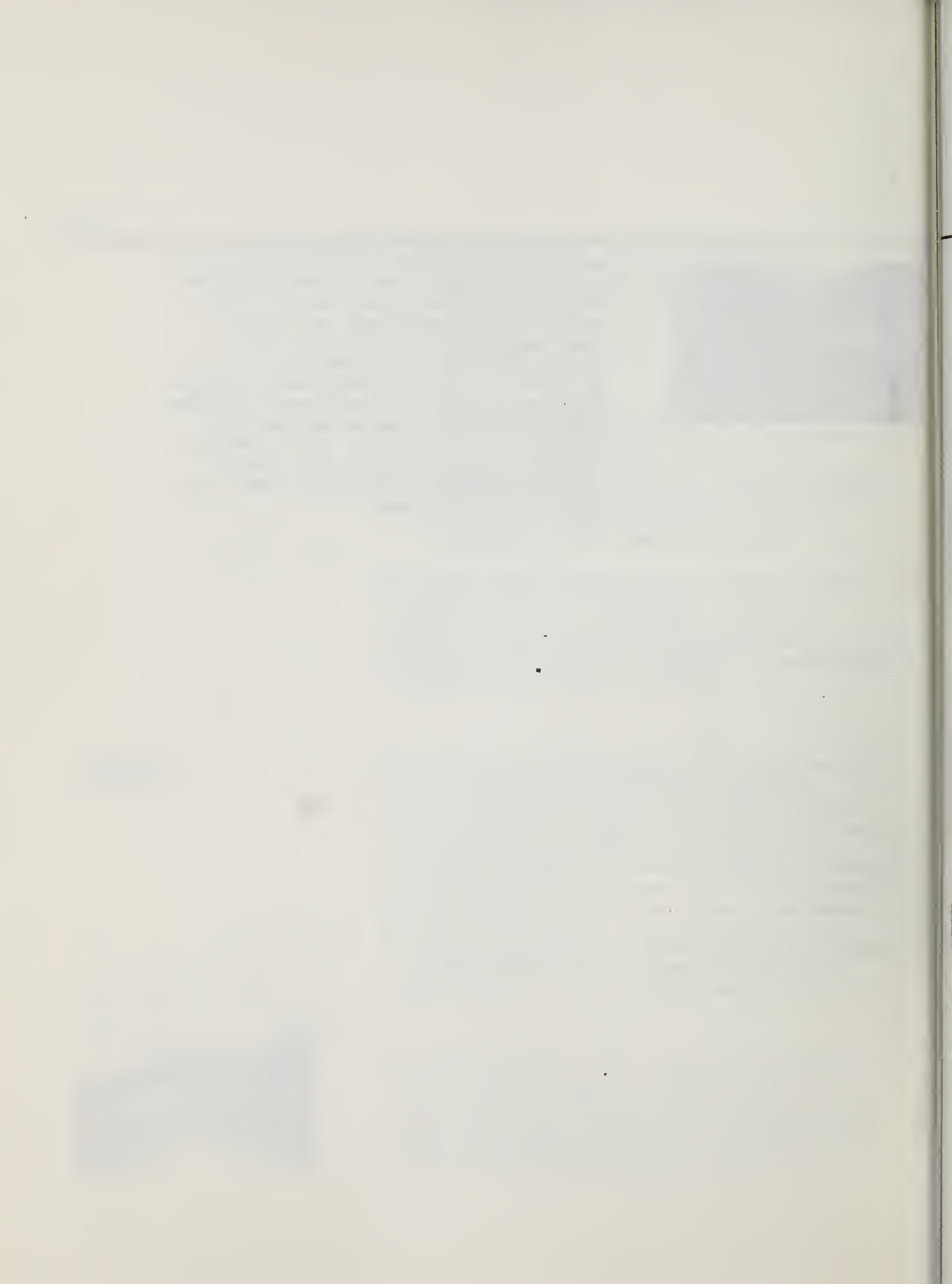


The only area that could be improved in the Scituate process is the committee's open-ended recommendations regarding the sale of the eleven properties. Because the BSSC best understood each property, and how it related to the rest of the town's inventory, it could have taken the opportunity to make specific





recommendations about the type of sale, the conditions of sale, and the preferable and unpreferable future uses. Some of these decisions will undoubtedly be covered in town meetings and Board of Selectmen deliberations when the properties come up for sale. It would be advantageous if the Committee were to provide a more definitive indication of how these sales should be handled. A Building Space Study Committee should consider a range of the possible options including development by the city/town or an RFP Process.



## Final Notes

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This handbook provides a glimpse of the exciting and rewarding possibilities of adaptive re-use. The study represents only a small fraction of the large and growing community of re-use experts in the MAPC Region-- a region that has produced some of the nation's finest examples of historic preservation and adaptive re-use. The total inventory of local examples is staggering, and includes every conceivable re-use problem and solution. Any individual or community official interested in adaptive re-use can find plenty of information and inspiration just by visiting neighboring communities.

By all indications, the role of adaptive re-use in local planning is certain to continue to grow. New needs and lifestyles will continue to emerge and to outgrow existing building types. And as labor and material costs climb, the savings derived from resourceful recycling will become an economic necessity for local municipal governments.

The Metropolitan Area Planning Council will be providing expanded services in the field of adaptive re-use. Through continued work with the Massachusetts Historical Commission, the Council will be involved in regional surveys and planning for adaptive re-use. The Council will offer technical assistance workshops on adaptive re-use beginning this fall, focusing on the planning tools and techniques used in adaptive re-use and building management. The MAPC also hopes to begin offering one incentive grant per year to encourage adaptive re-use in center revitalization projects. The Council will continue assisting local groups with applications for funding of local projects. And finally, its Department of Technical Assistance will be offering preliminary design assistance to local groups with re-use projects in cities and towns.





## CHAPTER 10

The first part of the chapter discusses the importance of the environment in the development of the human mind. It argues that the environment plays a crucial role in shaping the child's cognitive and emotional development. The text emphasizes that children learn from their interactions with the world around them, and that a rich and stimulating environment is essential for their growth.

The second part of the chapter explores the concept of the "zone of proximal development" (ZPD), which is the difference between what a child can do independently and what they can achieve with guidance from a more knowledgeable person. This concept is central to understanding how children learn and how adults can best support their development.

The third part of the chapter discusses the role of language in cognitive development. It argues that language is not just a means of communication but also a tool for thinking. The text explores how the acquisition of language enables children to represent the world around them and to engage in more complex thought processes.

The fourth part of the chapter discusses the importance of play in child development. It argues that play is a fundamental way for children to explore the world, learn about themselves, and develop social skills. The text emphasizes that play should be encouraged and supported by adults, as it is essential for children's overall development.

The final part of the chapter discusses the role of culture in child development. It argues that children's development is shaped by the cultural context in which they live. The text explores how cultural values and practices influence children's learning and behavior, and how adults can help children understand and navigate their cultural environment.



## Directory of Organizations

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The following organizations, agencies, commissions, and private firms can provide the local official with information and advice on historic preservation and/or adaptive re-use. The listing of private firms is for the reader's reference only, and should not be interpreted as an endorsement by MAPC.

### NATIONAL

Advisory Council on Historic Preservation  
1522 K Street, N.W.  
Suite 430  
Washington, D.C. 20005

U.S. General Services Administration  
Historic Preservation Officer  
Washington, D.C. 20405

U.S. Department of the Interior  
National Park Service  
Washington, D.C. 20240

National Register of Historic Places  
National Historic Landmarks Program (National  
Survey of Historic Sites and Buildings)  
Historic American Buildings Survey  
Historic American Engineering Record  
Interagency Archeological Program  
Natural Landmarks Program  
National Environmental Education Landmarks Program

National Trust For Historic Preservation  
740-748 Jackson Place, N.W.  
Washington, D.C. 20006

A private, non-profit organization whose programs include advisory services, property ownership, funding programs, and public information. The National Trust publishes a monthly newspaper, Preservation News; a quarterly magazine, Historic Preservation; and books and technical publications.

New England Field Office  
100 Franklin Street  
Boston, Mass. 02144  
(617) 227-8054

An organization jointly sponsored by the National Trust for Historic Preservation, the New England Field Office acts as a clearinghouse for information concerning legal, economic, and organizational strategies in preservation.

American Association for State and Local History  
1400 Eighth Avenue South  
Nashville, Tenn. 37203

American Association for State and Local History  
1400 Eighth Avenue South  
Nashville, Tenn. 37203

American Institute of Architects  
Committee on Historic Resources  
1735 New York Avenue, N.W.  
Washington, D.C. 20006

American Institute of Planners  
1776 Massachusetts Avenue, N.W.  
Washington, D.C. 20036

American Society of Planning Officials  
Planning Advisory Service  
1313 East 60th Street  
Chicago, Ill. 60637

Education Facilities Laboratories  
850 Third Avenue  
New York, N.Y. 10022

Society of Industrial Archeology  
c/o Room 5020  
National Museum of History and Technology  
Smithsonian Institution  
Washington, D.C. 20560



## STATE

Architectural Conservation Trust (For Massachusetts)  
(ACT)  
45 School Street  
Boston, MA 02108  
(617) 523-8678

ACT's purposes are to plan and establish economically sustainable uses for buildings of historic, architectural or cultural significance; to encourage a broad public/private partnership to support project activities; to increase local tax revenues by rehabilitating deteriorating properties; to finance continuing projects through revolving funds; to provide professional counsel and financial support; to inform citizens and community officials of the multiple benefits of continuing use for existing structures.

Commonwealth of Massachusetts  
Office of State Planning (OSP)  
1 Ashburton Place - 21st floor  
Boston, MA 02108  
(617) 727-5066

Coordinates the preparation of statewide plans and policies for growth and development in the Commonwealth. OSP works closely with the Dept. of Community Development on state housing and community development policies that emphasize revitalization of neighborhood and city and town centers.

Massachusetts Department of Community Affairs (DCA)  
Building Reuse Project  
1 Ashburton Place  
Boston, MA 02108  
(617) 727-7127

The DCA Building Reuse Project encourages communities to reuse vacant downtown buildings for a variety of public and private purposes. The project has worked with four communities on their reuse problems: Southbridge, Lawrence, Haverhill and North Adams. The Project focuses on helping communities overcome a number of

obstacles frequently encountered in reuse projects. The Project offers help with such problems as local zoning and parking regulations, lack of information in assessing the feasibility of reusing old buildings; overcoming negative attitudes towards reuse; uncertainty of local property tax rates etc.

The DCA's Housing Development staff is working to encourage local housing authorities to use vacant and underutilized buildings for housing in cases where reuse offers savings in cost or other social or aesthetic advantages over new construction. DCA gives priority to requests from communities with demonstrated housing shortages and an interest in using existing buildings.

Massachusetts Historical Commission (MHC)  
294 Washington Street  
Boston, MA 02103  
(617) 727-8470

The Massachusetts Historical Commission, a division within the Office of the Secretary of the Commonwealth, is the state agency responsible for historic preservation. The members of the MHC comprise the state review board for historic preservation in Massachusetts. MHC encourages local involvement in preservation. The Commission offers a continuing program of technical assistance to local historical commissions and preservation organizations in all aspects of historic conservation and development directed towards the adaptive reuse of historic buildings. MHC is responsible for compiling the official Inventory of the Historic Assets of the Commonwealth as well as reviewing and nominating National Register applicants. Matching grants are administered through the MHC in two areas: in survey and planning activity and for acquisition and development of National Register properties. MHC can advise and assist communities in implementing the procedures for creation of an effective local preservation program.

Metropolitan Area Planning Council  
Department of Technical Assistance  
44 School Street  
Boston, Mass. 02108  
532-2454

MAPC encourages adaptive re-use as an integral component of local community planning. The Department of Technical Assistance provides information, referrals, and preliminary design assistance to cities and towns in the metropolitan area. The staff has completed a comprehensive survey of potentially historic buildings in town centers and has inventoried the region for past and potential re-use activity.

The Department of Housing is encouraging the coordination of underutilized municipal properties with housing demands. The two departments will jointly offer a workshop on adaptive re-use and building management in Fall 1979.

Society For The Preservation of New England Antiquities  
(SPNEA)

SPNEA is the oldest and largest regional preservation organization in the country. Besides operating a large number of historic house museums, it operates a Consulting Services Department which offers technical assistance to those seeking to make conversion or renovation plans for older buildings.

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PRIVATE FIRMS

Architects  
& Developers

Anderson, Notter, Finegold, Inc.  
77 North Washington Street  
Boston, Mass.  
227-9279

Childs, Bertman, Tsekares, & Casendino (CBT)  
306 Dartmouth Street  
Boston, Mass.  
262-4354

Crowninshield Corporation  
18 Crowninshield Street  
Peabody, Mass. 01960  
531-0015

Design Alliance  
419 Boyston Street  
Boston, Mass.  
262-5166

Gerard Doherty  
1200 Hancock Street  
Quincy, Mass.  
471-8131

Drummey, Rosane, Anderson, Inc.  
141 Herick Road  
Newton, Mass.  
964-1700

Endevor Inc.  
25 Mt. Auburn Street  
Cambridge, Mass. 02138  
661-1159

Gloucester Development Team  
159 Main Street  
Gloucester, Mass. 01930  
283-2135

Leventhal and Conant Associates  
44 Chestnut Street  
Waban, Mass.

Myerson/Allen and Company  
306 Dartmouth Street  
Boston, Mass. 02116  
427-2400

North Acceptance Corporation  
23 Central Avenue  
Lynn, Mass. 01901  
599-4343



Perry, Dean, Stahl, and Rogers, Inc.  
177 Milk Street  
Boston, Mass.  
423-0100

Sea Rock Estate  
Construction/Renovation  
7 Peale House Square  
Manchester, Mass.  
526-1020

Sidney-Noyes Associates  
One Lincoln Street  
Newton Highlands, Mass 02161  
964-0280

## Directory of Funding

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The organizations, agencies, or commissions listed below administer, grant, or have the best information on funding programs for historic preservation and/or adaptive re-use.

### FEDERAL

- ☐ Economic Development Administration (EDA)  
U.S. Department of Commerce

Funds for public works projects in areas of high unemployment, especially if related to construction industry. Projects can involve the rehabilitation of state or locally-owned structures and improvements to basic neighborhood conditions. Programs of this type do not occur on a regular basis. Action should be taken quickly when a program of this type is announced.

For more information contact: Commerce Department, U.S. Government, Economic Development Administration, 441 Stuart Street, Boston, MA. 223-0695

- ☐ Title 1 Home Improvement Loans

Loans for improvement of residential or other properties. Owner of a single family home can borrow up to \$10,000 for 12 years. Maximum loans on multi-family structures are \$5,000 per unit, not to exceed a total of \$25,000. Loans are made at market interest rates.

For more information contact: HUD Area Office, 15 New Chardon Street, Boston, MA. 223-4100

- ☐ HUD/Department of Interior  
Historic Preservation Loans

Expansion of Title I - Home Improvement Loan Program of the National Housing Act.

Loans to preserve, rehabilitate or restore residential structures of historic value (either on, or eligible for, the National Register of Historic Places) work done to improve the basic livability and utility of a property. The building may have non-residential use not exceeding 20% of usable

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floor space.

Loans of up to \$15,000 per dwelling unit.  
Not to exceed \$45,000 per building. Up  
to 15 years to repay. Made at current  
market interest rates, not to exceed 12%.

For more information contact: Mass.  
Historical Commission, 294 Washington  
Street, Boston, MA. 02108 727-8470

- ☐ Historic Preservation Grants-in-Aid  
U.S. Dept. of the Interior (National Park  
Service)  
(administered by the Mass. Historical  
Commission)

Federal funds are allotted to the state and  
then awarded by the Mass. Historical Com-  
mission to local governments, private  
organizations or individuals. Funds are  
in the form of matching grants-in-aid of  
up to 50%, and can be used for:

Survey and Planning - to identify and  
nominate properties to the National  
Register of Historic Places.

Acquisition of historic property.

Development - protection, rehabilitation  
and restoration of historic properties  
on the National Register.

For more information contact: Mass.  
Historical Commission, 294 Washington  
Street, Boston, MA. 02108 727-8470

- ☐ National Trust for Historic Preservation  
Consulting Service Grant Program

Provides advice in the initial stages of  
project development or removing or solving  
barriers to implementation. Favors new and  
innovative projects with widespread applica-  
tion.

No grant exceeds \$5,000. Grants must be  
matched by the recipient with an equal or

FEDERAL  
(cont'd.)

greater amount. The average grant is approximately \$1,000-\$2,000.

Examples: Sponsored a design workshop for rehabilitation of 19th century houses in an inner-city neighborhood.

Funds to develop financing techniques for acquiring and rehabilitating historic houses.

Funds to do feasibility study converting railroad terminal into hotel/restaurant complex.

Nonprofit, incorporated organizations and public agencies are eligible. Applicant must join the National Trust for Historic Preservation. Funds are only for the services of a consultant. Money may not be used for actual construction work.

For more information contact: Financial Aid Assistant, Office of Preservation Services, National Trust For Historic Preservation, 740-748 Jackson Place, N.W., Washington, D.C. 20006

- ☐ Department of Housing and Urban Development (HUD)  
Section 8

Encourages the provision of low-income housing by providing partial rent payments for eligible tenants who occupy new, substantially rehabilitated or existing rental units. The owners of the property must find their own sources of funding for construction or rehabilitation.

- ☐ HUD  
Section 202  
Loans for Housing the Elderly or Handicapped



Provides for new construction or substantial rehabilitation of properties. No-interest loans available to private, incorporated nonprofit organizations. Loans can be used for up to 80% of planning costs (design fees, preliminary site engineering, legal assistance and consultations).

☐ HUD

Public Housing Program

Provides funds and technical assistance to Public Housing Agencies, (PHA). Funds used for the development and operation of low-income housing. Of interest to preservationists: public housing agencies may acquire various types of buildings, including non-housing structures, which may be converted to housing uses.

Eligible structures are those owned by: HUD, PHA, local government, state government

☐ HUD

Community Development Block Grant (CDBG)

Federal funds to communities for projects that will improve urban living conditions through housing and environmental changes. The community may use these grants for preservation-related activities, such as:

- Surveys of historical and cultural resources,
- Establishment of revolving funds for the acquisition, rehabilitation, and sale of historic properties,
- Establishment of loans or grants for rehabilitation of historically and/or architecturally significant properties,
- Development of a local preservation plan,
- Establishment of historic district legislation.

For more information contact: HUD Area Office

☐ HUD 701  
Comprehensive Planning Assistance

These funds can be used for preservation related activities, as long as they are part of a total comprehensive plan. Activities can include survey and evaluation of historic properties, preparation of historic district legislation and historic preservation plans based on survey data, and determination of preliminary cost estimates for the rehabilitation or restoration of significant buildings or districts.

For more information contact: HUD Area Office,  
15 New Chardon Street, Boston, Mass. 223-4100 or  
Office of State Planning (OSP)  
1 Ashburton Place, 21st floor, Boston, Mass.  
02108 (617) 727-5066

☐ HUD Section 502  
Small Business Administration's Urban  
Revitalization Program

Long-term loans for the purchase, renovation, modernization, and facade preservation of store property by small businesses. Excellent tool for use by smaller communities for the preservation and revitalization of their downtown areas. Loans at 6 5/8% for up to 25 years. In each case a local development company must be organized in the community. The loans are made to the local development company and then re-loaned to the individual businesses. (see p. 88)

☐ Community Facilities Loans  
U.S. Department of Agriculture

These loans are for the purpose of financing community facilities for public use in rural areas and in towns with populations less than

10,000. Loans are made to local governments at 5% for up to 40 years for projects such as libraries, fire stations, and community buildings.

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**STATE**☐ Massachusetts Housing Finance Agency (MHFA)

Provides rehabilitation loans and grants to stimulate housing. Makes low-interest loans to private developers who are "limited profit" or non-profit organizations to build or rehabilitate housing for a mixture of low, moderate, and middle income tenants. New emphasis on housing rehabilitation and building reuse in old neighborhoods.

MHFA seeks strong developers, desirable sites, and sound proposals to produce high quality housing. Racial mix and economic mix of tenants is high priority, as are low operating expenses and energy conservation.

For more information, contact: MHFA, 45 School Street, Boston, Mass. 02108 723-9770

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**FUNDING  
STRATEGIES**☐ 121A Tax Agreements

Real estate taxes may be lowered for buildings and sites which have been rehabilitated by a limited dividend corporation. With 121A agreement, such a corporation may for 15 years make lower tax payments than conventional real estate property taxes. This period may be extended by communities outside Boston for an additional 10 years.

☐ Tax Increment Financing

Property taxes collected above a certain amount in a district are put aside for use only within that district. The money can be used immediately for any special needs of the area or can be invested to be used at a later date. May require state enabling legislation.

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☐ Revolving Funds

A technique to multiply funds. Relatively new concept wherein money is used to buy and perhaps restore an old structure and the money is returned to the fund when the structure is sold. Revolving funds can be established with block grants, National Park Service Grants, Urban Reinvestment Task Force Funds, or other money. Revolving funds can be used to acquire, preserve and sell historic properties or for loans to owners. Proceeds are returned to the fund for other projects, so the funds and their impact are multiplied. Private organizations, as well as local and state government can use this technique.

☐ Banking Pools

A banking pool is an arrangement whereby local banks agree to accept a certain dollar amount of loans at less than market interest rates. Central to this kind of commitment is a willingness on the part of the banks to derive less than market income in return for their long-term investment in the community. The rate of interest is established based on the Federal Home Loan Bank rate, but any other significant index will suffice.

☐ Local Development Corporations

LDC's are formed to provide low interest loans to encourage owners to renovate their properties and to promote general business expansion. Frequently an LDC will be formed for revitalization of a specific district or sector of the community, such as the downtown or central business district.



☐ Tax Reform Act of 1976

On October 4, 1976, the Tax Reform Act of 1976, the first major revision of the Internal Revenue Code since 1969, was signed into law. Section 2124 of the act, "Tax Incentives to Encourage the Preservation of Historic Structures" is of particular interest. This section provides for changes in the Federal treatment of demolition costs, rehabilitation expenses, depreciation, and charitable contributions of partial property interests when historic properties are involved.

The provision applies to any "certified historic structure," which is defined as depreciable property listed in the National Register, located in a National Register District and certified as contributive to the district, or located within a locally designated and approved historic district.

The Tax Reform Act provides disincentives for demolition and incentives for rehabilitation. Section 2124(b) provides that an owner of a certified historic structure may not deduct from his income any expenses for demolition. Instead, these amounts must be capitalized and added to the basis of the property, thereby deferring the tax benefit and reducing it .

Section 2124(a), on the other hand, provides that a taxpayer may amortize over a 60-month period any capital expenditure incurred in the certified rehabilitation of a certified historic structure. Sections 2124(c) and (d) concern rates of depreciation, making it more attractive to conduct rehabilitation than demolition.

For further information contact: National Register of Historic Places, National Park Service, U.S. Department of the Interior, Washington, D.C. 20240

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"Preservation and Taxation," Preservation News, supplement, May 1976.

"Restoration and Remodelling," Progressive Architecture, special issue, November 1976.

"Recycling," Architecture Plus, 2:2, March/April 1974, p. 36-87.

"Same Place, New Face," Real Estate Today, 8:5, May/June 1975, pp. 23-41.

"Saving Old Buildings and Money Too," Nation's Business, 59:46-51, June 1971.

"The Tax Advantages in Restoring Buildings," Business Week, #2394 August 18, 1975, pp. 91-92.

Tsekares, Charles, "One Winthrop Square, Boston," Urban Land, 35:7, July-August 1976, pp. 14-17.

Westbrook, Crawford C., "Downtown Renovation Doesn't Always Mean Destroying Everything and Starting Over," American City, 87:65-6, December 1972.

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New York City: 1975. 264 pp.

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Costonis, John L., Space Adrift, Saving Urban Landmarks through the Chicago Plan. Urbana, Illinois: 1974. 207 pp.

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Report on historic preservation through acquisition of protective agreements on buildings within the town. Information on history of preservation, citizen groups, and legal and economic considerations.

Kidney, Walter C., Working Places, The Adaptive Use of Industrial Buildings. Pittsburgh: 1976. 172 pp.

Case studies, emphasis on legal and economic resources.

Massachusetts Department of Community Affairs,  
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# Sample Space Needs Survey Form

97  
A-1

## INTRODUCTION

The Building Space Survey Committee was formed on July 17 by the Board of Selectmen to develop a plan for municipally owned buildings in the Town of Brookmere. The Committee has developed this inventory form to assess the town's space needs. The attached Space Needs Survey will enable the Committee to manage public facilities better and to plan and coordinate the town departments' activities more efficiently.

Please complete the survey and return it to the Clerk of Committees at Town Hall, 100 Lindley Street, by 4:30 p.m., Monday, January 14, 1980.

## GENERAL INFORMATION:

Name of Department, Board, Committee, Office:

1).....

Identify the statute, ordinance, by-law, or decision which established your department, board, or committee:

2).....  
date:  
.....

To which town committee, board, or department is your group accountable:

3).....

Present location:

4) main office:  
.....  
branch office(s):  
.....  
.....

## OPERATIONS

Describe the nature of your department's work.  
(ie: is it administrative, research, public information, archiving, field services, etc.?)

5).....  
.....  
.....

OPERATIONS  
(continued)

Is your operation .....permanent or .....temporary?  
(check one). If temporary, indicate year or month  
when activities are expected to be completed:

6).....

What are your department's daily operating hours?

7)..... Mon.-Friday:  
..... weekends:  
.....

List the busiest and slowest months of the year:

8)..... busiest:  
..... slowest:  
.....

List all the other town departments, boards, committees, and/or offices your group works with on a regular basis. Describe the nature of the working relationship:

9).....  
.....  
.....  
.....

..... (ie: work with assessors office, joint research  
..... and planning on vacant and underutilized prop-  
..... erties. Minimum 10 hours per week at central  
..... files and computer center.)  
.....

Do any of your department's responsibilities or functions overlap or duplicate those of other town offices, departments, or committees? If yes, explain the nature of this overlap. In your opinion, is this overlap necessary or wasteful? How could this be improved?

10).....  
.....  
.....

FACILITIES

Does your department or office occupy its own (a separate building? If yes, give description: ....no

11)..... name:  
..... address:  
..... date of construction:  
..... condition:  
.....

Is the building adequate for the present needs and activities of your department? Consider location, amount and type of space, equipment, access, etc.)

12).....  
.....

Will this facility suit your immediate needs? (projected for next twelve (12) months) Explain:

13).....  
.....

Will this facility accommodate your future needs? (projected for next ten years) Explain:

14).....  
.....  
.....

EQUIPMENT

List all major office equipment currently used by your department, office, or committee:

15).....  
.....  
.....  
.....

List any shared, centralized equipment or services your department uses. (ie: xerox, blueprint, etc.)

16).....

EQUIPMENT  
(continued)

.....  
.....  
.....

List amount and type of storage space currently used  
by your department:

17) shelving:	lin. feet.
closet:	sq. feet.
files:	no. drawers
other:	

Describe your department's current needs for vault  
and safe space. Are these needs being satisfactorily  
met under present arrangements?

18).....  
.....

List all vehicles assigned to your department, office,  
committee, or board:

19).....  
.....  
.....  
.....

Describe present garage facilities and compare to ideal  
garaging arrangement:

20).....  
.....  
.....  
.....

SUPPLEMENTARY  
INFORMATION

List at least three (3) assets of your department's  
present accomodations that you feel are necessary



SUPPLEMENTARY  
INFORMATION  
(continued)

to successful operation: (ie: location within walking distance of elderly housing site, proximity to town center, easy access to central reproduction services, next to computer center.)

21).....  
.....  
.....  
.....

List at least three (3) drawbacks of your office or department's accomodations that your feel should be improved: (ie: overcrowding of growing staff, poor visibility from street pedestrian traffic, inadequate parking, too much sharing of space with other non-related uses such as the Veteran's Service and the Historical Society).

22).....  
.....  
.....  
.....

OTHER COMMENTS  
& CONSIDERATIONS

23).....  
.....  
.....  
.....  
.....  
.....  
.....

DATA SUMMARY CHART

.....  
see next page  
.....  
.....

DATA SUMMARY CHART

Please complete the blanks for present, immediate (projected over the next twelve months), and future (projected over the next ten years) needs for the category indicated in the left column.

	PRESENT	IMMEDIATE	FUTURE	COMMENTS
Office Staff				
Full Time	.....	.....	.....	.....
Part Time	.....	.....	.....	.....
12 months?	.....	.....	.....	.....
Other Personnel				
Full Time	.....	.....	.....	.....
Part Time	.....	.....	.....	.....
12 months?	.....	.....	.....	.....
Space in sq. ft.				
General Office	.....	.....	.....	.....
Private Offices	.....	.....	.....	.....
Conference Room	.....	.....	.....	.....
Storage Area	.....	.....	.....	.....
Reception/Waiting	.....	.....	.....	.....
Other (specify)	.....	.....	.....	.....
Equipment				
Desks, secretarial	.....	.....	.....	.....
drafting	.....	.....	.....	.....
Files, 2 drawer	.....	.....	.....	.....
4 drawer	.....	.....	.....	.....
5 drawer	.....	.....	.....	.....
flat plan	.....	.....	.....	.....

	PRESENT	IMMEDIATE	FUTURE	COMMENTS
plan hold	.....	.....	.....	.....
Shelving				
metal	.....	.....	.....	.....
wall mounted	.....	.....	.....	.....
Safes, size: _____	.....	.....	.....	.....
size: _____	.....	.....	.....	.....
Vaults	.....	.....	.....	.....
_____	.....	.....	.....	.....
Special Equipment				
blueprint	.....	.....	.....	.....
photographic	.....	.....	.....	.....
graphic	.....	.....	.....	.....
other	.....	.....	.....	.....

FOLLOW-UP  
INFORMATION

Contact person for your department, office, committee,  
or board:

24) name: .....  
    phone: .....

Preparer of this survey response:

25) name: .....  
    title: .....  
    date: .....

PHOTOGRAPHS  
& DIAGRAMS  
(if available)





105  
B-1

This image shows a single sheet of white paper with a light gray background. A dense grid of small black dots forms a rectangular frame around the perimeter of the page. The dots are arranged in a regular pattern, creating a guide for writing or drawing. There is no text or other markings on the page.

GENERAL  
(continued)

Describe the current status of the building. For instance, is it vacant, abandoned, occupied, or due to be closed? How and when?

- 6) .....  
.....  
.....  
.....

Note: For each of the categories below, list both current dimension, condition, or type, as well as the possible dimension, condition, or type where indicated.

PHYSICAL  
DESCRIPTION

Building height:

- 7) existing: .....  
8) possible: .....

Depth on site at deepest point:

- 9) existing: .....  
10) possible: .....

Ceiling Heights:

- 11).....

Exits & means of egress:

- 12).....  
.....

Exterior Openings:

- 13) window type and number: .....  
14) door type and number: .....

Other features:

- 15).....  
.....  
.....

SITE DESCRIPTION

Zoning: give the local zoning classification and brief description of allowed uses.

16) .....  
.....

Access: give street names, means of access, etc. Include requirements for refuse collection, deliveries in the case of retail/commercial use, etc.

17) .....  
.....  
.....

Parking: include description of entries and exits, number and type of parking, square footage of lot:

18) .....  
.....

Handicapped access and building code. Describe any existing or needed ramps, facilities, curb cuts, etc.

19) .....  
.....  
.....

Adjacent Uses and adjacent structures. Provide brief description of orientation and use.

20) .....  
.....  
.....  
.....

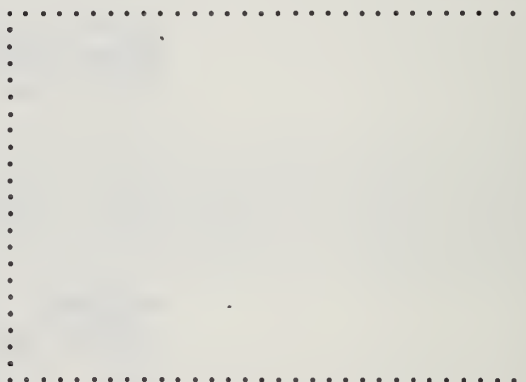
Other site features:

21) soil: .....  
22) paved areas: .....  
23) exposure: .....  
24) orientation: .....  
25) slope: .....

SITE DESCRIPTION  
(continued)

- 26) foliage: .....  
27) views: .....  
28) other: .....

Sketch site plan showing features described above:

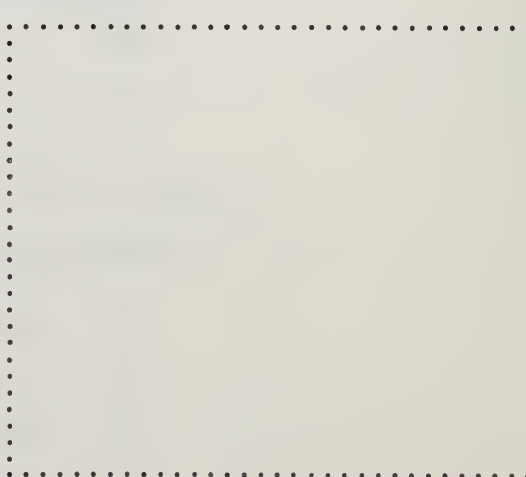
28) 

STRUCTURAL DATA

Describe construction type. (ie: wood frame, heavy timber with shingle on granite foundation, etc.)

- 29) .....  
.....  
.....

Sketch a load diagram (plan view) and indicate bay/wall/column spacing.

30) 



STRUCTURAL  
(continued)

Describe the general structural health of the building. Note any surface or settlement cracks.

31) .....  
.....  
.....

Roof type, style, and condition:

32) .....  
.....

Insulation quality of building shell:

33) .....  
.....

Foundation, type and condition:

34) .....  
.....  
.....

Engineer's Comments:

35) .....  
.....  
.....  
.....

ARCHITECTURAL

Is the building of a particular recognizable style, period, or era?

36) .....  
.....

Level of detail and ornamentation that remains or is salvagable through restoration. Rate as poor, fair, good, very good, excellent, vintage and describe:

37) .....  
.....

ARCHITECTURAL  
(continued)

Image of building. For instance, does it appear highly public, or very private? Is the building type clearly expressed architecturally? In the case of a change of use, is the imagery manipulable? How?

38) .....  
.....  
.....  
.....

Architectural style and imagery of adjacent and neighboring structures:

39) .....  
.....  
.....

Historian's comments:

40) .....  
.....  
.....

MAJOR SYSTEMS

Electrical. Condition, type, maintenance history, required updating, etc.

41) .....  
.....  
.....  
.....

Plumbing. Condition, type, maintenance history, required updating or repairs, etc.

42) .....  
.....  
.....

HVAC (Heating, Ventilating, Air Conditioning)  
Condition, type, mainetnace history, required

maintenance and repairs:

43).....  
.....  
.....

RE-USE INFORMATION

Previous research, studies, assessments of the building for re-use or rehabilitation:

44) .....  
.....

Unused reclaimable areas in the building available for utilization through re-use. (ie: under stairs, attics, basements, etc.)

45) .....  
.....  
.....

Attach photographs:



Sketch of Floor Plan: .....





# Sample Request For Proposals

113  
C-1

## BACKGROUND

In June 1979 the School Committee of the Town of Brookmere voted to close two school department buildings, the Reese School and the Central Schoolhouse. The decreasing trend in school-going population is expected to continue in Metropolitan Boston. After extensive research, public review, and careful deliberation, the school department has determined that the two buildings are not necessary to their operations. On July 15, 1979, the Reese School and the Central Schoolhouse were turned over to the Board of Selectmen and designated surplus structures. The Board held a series of public hearings, conducted an internal space needs inventory of its own departments, and has decided to make the two properties available for private development. The Selectmen have decided to follow a Request For Proposals procedure.

## STATEMENT OF OBJECTIVES

- ☐ The town desires to sell the properties individually or as a package; to be adaptively re-used to meet new community needs.
- ☐ The town desires to gain financial return from the sale and continued use of the two buildings.
- ☐ The town desires to use the two properties as ways of addressing current demands for housing and downtown office space. Specific explanation of these needs is included in the later sections of the developer's kit.
- ☐ Uses may be those allowed under the Town of Brookmere Zoning Ordinances (1971) or those contingent upon the granting of a special permit or variance.
- ☐ A combination of new construction (ie: new structures in addition to the existing) will be considered at the Reese School site but not at the Central Schoolhouse property.
- ☐ The town has a strong preference for rental housing at low, moderate, and market rate. Proposals calling exclusively for condominiums are discouraged.
- ☐ Historic preservation funds are available for the work on the Central Schoolhouse. The building was listed on the National Register of Historic Places

in June 1977. The Selectmen will favor proposals which utilize the state and federal programs available for the restoration and re-use of eligible sites.

- ☐ The Selectmen will follow the recommendation of the Brookmere Housing Authority in favoring proposals which provide housing via government subsidy for low and moderate income residents and the elderly. Set-aside or buy-back schemes are encouraged.
- ☐ The town will consider negotiating a Chapter 121A Tax Agreement on suitable proposals.

The town will not consider any proposal which calls for the demolition of either of the two structures.

DESCRIPTION  
OF PROPERTIES

The Reese School                      42 Country Fram Road

The Reese School was constructed in 1912 from the plans of architect Andrew Nolles of Boston, Mass. It includes a large main school building and a separate field house on a five acre site.

○ The Main Building

The Main Building is a four story structure with a full basement. It has a granite foundation, exterior walls of red brick, and an internal structure of heavy timber. Each floor provides a gross building area of 9225 square feet.

Windows are wood sash. Lexan storm windows have been added to all windows on each facade in 1974. The upper floors are of Vermont Oak. The basement floor is of concrete. Walls are of plaster with hardwood trim. All of the original detailing and ornamentation is intact. The entire interior was repainted in 1970.

The tar and gravel roof is over 15 years old and will require some repair, especially on the eastern side. Exterior gutters and downspouts service all sections of the roof but will also need some repair and modernization.

The plumbing and wiring systems were completely renovated in 1960. The central steam heating system with a cast iron boiler will need modernization and servicing.

The main building served from 1912-1936 as a neighborhood school for grades K-12. From 1936-1978 it has been a high school for grades 9-12. The large auditorium on the north side of the building has been used for a variety of civic functions, dramatic productions, and town events.

#### ○ The Field House

The 1949 Field House lies behind (to the south) of the Reese Main Building. It is a concrete block structure with an asphalt shingle roof and a concrete slab floor. It is a simple 25 X 40 foot rectangle, providing 1000 square feet of usable building area.

The east side has a roll-type garage door. The north south walls each have one steel casement window. The building is supplied with cold running water and 110 volt electrical power. The field house is not heated.

The field house was constructed to store athletic and maintenance materials and equipment. It has a small (10 X 20 foot) concrete patio on the east side. The structure was repainted in 1976 and is in overall excellent condition.

The school site is accessible from two sides; from the south via Route 6 and from the north via Old Country Road. A paved and landscaped parking lot was added in 1970 on the south side. The school grounds include two tennis courts and a large play area on the south side of the building. The site slopes slightly from the south side of the main building to Route 6.

The site is in a residential district approximately seven miles from the Brookmere town center. A privately-owned densely wooded parcel lies to the east. A town-owned park and playground bounds the property on the west. Private residences lie across Route 6 on the south and along Old Country Road on the north.



Central Schoolhouse                      136 Lindley Street

The Central Schoolhouse was constructed in 1824 from the plans of architect Henry R. Robeson. The building is typical of the two-story wood frame schoolhouse in New England town centers.

The building is a simple 35 X 65 foot rectangular box with a conventional gable roof. Its wood frame rests on a granite foundation. The exterior is painted clapboard and its internal structure is of heavy timber.

Windows are double hung wood sash. The original wide board floors are painted maple, with some areas covered in industrial carpeting. Interior partitions are of wood.

The schoolhouse's electrical system was completely re-wired in 1962. New toilet and plumbing facilities were installed in 1965. Central steam heat via oil burner was modernized and completely overhauled in 1968. An original wood-burning stove also remains.

The exterior is in excellent condition. The asphalt shingle roof was restored in 1970. New gutters and drains were also added to the building at this time.

The Central Schoolhouse has been used exclusively by the School Department since its completion in 1828. At first the two room school served as a grammar school for grades 1-6. From 1901 to 1968 it was used as a pre-school and kindergarten. Since 1968 the building has been used for administrative purposes by the School Department.

The Central Schoolhouse occupies a flat 1/4 acre site in the northern section of the town business district. Located at the intersection of Lindley and Quiner Streets, the building is in a prominent and heavily trafficked location. A view down Lindley Street includes the beautiful town hall and town commons. The business district continues north past the Central Schoolhouse for three blocks before gradually becoming residential.

The site includes access from the back of the lot through an unpaved parking lot that the schoolhouse shares with surrounding commercial establishments.



This parking lot comprises the bulk of the quarter acre site.

#### CRITERIA FOR EVALUATION & SELECTION

The primary concern of the Selectmen is the realization of maximum benefit to the community of Brookmere. This will be measured in terms of economic impacts to tax income, long term economic benefits, and gains for the surroundings areas of the properties. All of the submittals will be evaluated according to the following criteria:

- The proposed uses for the two buildings, their compatibility with surrounding neighbors, their impacts on the housing and office space shortages, etc.

- The design quality of the proposal, especially to the extent that the overall design concept optimizes site assets and the architectural integrity of the existing structures.

- The demonstrated skill and expertise of the developer and his team of architects and consultants. Previous experience with successive restoration and/or adaptive re-use will be to the proposer's advantage.

- The financial feasibility of the development proposal, including the individual financial strength of the developer.

- The extent to which the development proposal is integrated with the Town Center Renewal Plan of the Town of Brookmere (1976), the Housing Needs Report (1977) of the Brookmere Housing Authority, and the Center Revitalization Study of the Brookmere Planning Board (1977).

#### CONDITIONS OF SALE

The following are strict conditions of sale:

- ☐ No demolition of the two schools will be considered.
- ☐ The entire structures shall be restored or adapted and utilized fully in the new plan.
- ☐ All rehabilitation on the existing structure will be done in conformance with state and local codes.

- ☐ The developer must be willing to abide by any and all regulations of federal, state and local agencies as regards center revitalization, historic preservation, and urban renewal. Familiarity with the Town Center Renewal Plan (1976) is particularly urged.
- ☐ Chapter 121A Tax Agreements are available to any suitable proposal, subject to future negotiation.
- ☐ No purchase price for the two properties is stipulated.
- ☐ The rehabilitation and restoration work must begin within ninety (90) days of the sale of the properties.
- ☐ The developer must demonstrate financial capability to undertake and complete the project.
- ☐ A deposit of ten (10) percent of the total purchase price shall be submitted to the Board of Selectmen by the chosen developer within five (5) working days of notification.
- ☐ Any submittal which does not provide some rental housing units will not be considered.

The Brookmere Board of Selectmen reserves the right to reject any proposal.

#### CONTENT OF SUBMITTALS

Developers interested in the purchase and restoration of the Reese and/or Central Schoolhouse must submit a final, complete proposal by 4:30 p.m., Monday, January 14, 1980, to the Office of the Clerk of Committees at the Brookmere Town Hall, 100 Lindley Street, Brookmere, Massachusetts. The final development proposal package must include the following:

- ☐ An official letter of interest including the name and address of the developer, corporation, partnership, or joint venture.
- ☐ Name and address of the developer's consultants (architects, engineers, market analysts) and a description of past and current projects. Include supporting materials, exhibits, as

necessary.

- ☐ A project summary including: a narrative of the proposed work; the overall scope and type of work involved; and an architectural program of proposed uses and square footages.
- ☐ The financial program for the building which shall include estimated cost of demolition, renovation, and new construction, and mortgage and equity commitments from lending sources and/or private investors. The financial information should be presented in the following manner:

#### Income Projection

Total net rentable office, retail, or residential space.

Gross annual rent per square foot for office and retail space. Use rent per unit per annum for residential.

Projected operating statement for first five (5) years, including gross rental revenue, allowance for vacancy, operating expenses, management fees, maintenance costs, and allowances for real estate taxes. The developer may work up two operating statements, one assuming conventional real estate taxes and one assuming a Chapter 121A Tax Agreement.

#### Financing Assumptions

Net income available for debt service and return on equity.

Estimated appraised value of the improvements, based on capitalization of net income. Specify assumed capitalization rate.

Loan amount.

Annual debt service.

#### Capital Improvement Assumptions

Estimated value of building, land, and site improvements.

Construction Costs.

Architectural and Engineering Fees

Financing, legal, administrative expenses.

Total development costs.

Distribution of total development costs per net rentable square foot of office, retail, commercial, civic, and/or residential space.

A statement of financial capability of the developer as provided by the HUD 6004 form, as in the Appendix. The developer must demonstrate that he has present financial resources to implement the development proposal.

- ☐ A final design proposal for the building(s) which shall include working plans and preliminary specifications, site plans, elevations, floor plans, cross sections, renderings, and landscaping/site work proposed.
- ☐ Supplemental information: the submission requirements established above are minimum requirements. Developers are encouraged to submit any additional information, exhibits, or materials that may be of assistance to the Board of Selectmen in evaluating the proposals.

## PROCEDURES

The developer's kit of materials and information is available from the Clerk of Committees and the Brookmere Town Hall, 100 Lindley Street. Developers may borrow the kit on a daily basis of purchase one for thirty dollars. (\$30.00).

The properties are available for inspection by appointment only. Arrangements for on-site visits and entering the buildings should be made with Mr. James W. Conrad, Clerk of Committees, 591-6150, ext 236. Arrangements should be made twenty-four (24) hours in advance.

Inquiries from prospective developers concerning the buildings, the properties, or the objectives of the project are welcomed. Requests for information should be made through the Clerk of Committees (591-6150, X 236 or the Public Information Officer (ext. 181).



Proposals Due: 4:30 p.m., Monday, January 14, 1980. The Clerk of Committees will acknowledge the receipt of each submittal and forward the materials to the Planning Director. The Planning staff will conduct a preliminary evaluation of the proposals. Each submittal will be checked for completeness. If any proposal is found to be lacking materials or information necessary for fair evaluation, the package will be returned to the developer with a request for the missing information. The missing information must be received by the Clerk of Committees within seven (7) working days of the request.

#### REVIEW OF PROPOSALS AND DEVELOPER SELECTION PROCESS

The Planning staff will prepare summaries and charts comparing the proposals and forward these with the original submittals to the Board of Selectmen.

The Board of Selectmen will conduct the final review using the criteria already identified. During the first week, each developer will be invited to make a presentation to the Board of Selectmen. Dates and times for these presentations will be arranged by the Clerk of Committees.

Following the presentations, the Board of Selectmen will narrow the field of entries to five finalists. This process will include four weeks of public hearings, open workshops with neighborhood groups, town departments, developer, and the Board of Selectmen, and regular Selectmen sessions. The list of finalists will be mailed to each developer on Monday, February 18, 1980.

Four weeks of consideration of the five finalists will follow. A detailed examination and evaluation of the architectural, financial, and planning aspects of each submittal will be conducted.

The selected developer will be announced on Monday, March 17, 1980. Negotiations between the Board of Selectmen and selected developer will follow.

#### FINAL NOTE

The Selectmen request that proposals and exhibits not exceed 11" X 14" in size, with a preference for standard 8½ X 11. A scale model is optional.

## Notes on Developer's Kits

### COMPONENTS OF THE KIT

The Developer's Kit provides all the necessary information for a developer team to prepare a submittal. The Request For Proposals outlines the community's fundamental goals, objectives, requirements, and procedures for the case. The Developer's Kit is a package of support materials for the RFP.

Using the Sample RFP in Appendix C as an example, the companion developer's kit would include:

- ☐ The Request For Proposals: sometimes the community will bind all the materials into a single package or manual, which should include the original RFP.
- ☐ The City Map: although the Reese School and the Central Schoolhouse are described in the RFP, the map provides an overview of location, access, adjacencies, etc.
- ☐ Zoning Map: the Reese and Central School facilities are in two different zoning districts. These would be identified and explained by the map and the copy of local ordinances.
- ☐ Zoning Ordinances/Amendments
- ☐ Property Assessments
- ☐ Site Plans
- ☐ Plans of each structure
- ☐ Photographs
- ☐ Supplementary information: The RFP refers to several documents that the developer should familiarize himself with while preparing a proposal. These would also be included:
  - Town Center Revitalization Plan
  - Housing Needs Report
  - Brookmere Planning Board Center Revitalization P.
- ☐ The RFP also makes clear that the town prefers certain programs, funding sources, or planning tools. Information on these would also be included, such as:
  - Historic Preservation Programs
  - Tax Reform Act of 1976
  - Standards (Federal) for Rehabilitation
  - 121A Tax Agreement

---

COMPONENTS  
(continued)

HUD Housing Assistance Programs

Explanation of buy-back or set-aside arrangements

- ☐ Standardized Forms: the community may want to develop standard summary sheets for the developer to use, or financial forms such as the HUD 6004. These should be included as parts of the kit.

PRESENTATION

The Developer's Kit may be bound together into a single document or left as separate parts of a kit. At least ten of the kits should be produced and the originals should be kept on hand in case more are needed.

Usually, the kit will be prefaced by a letter of invitation by the mayor, board of aldermen, board of selectmen, or redevelopment authority. This letter does little more than introduce the project, describe the area of the community that the properties are located in, and mention any ongoing programs that the re-use effort may be a part of.

One or two of the kits should be retained by the community for reference. One or two of the kits should be made available for daily loan, perhaps through the public library. The remaining would be made available for sale to developers. Price should cover production costs and staff handling time.

